User Manual

Version 1.3.1

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Chapter 1
Introduction

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What Are Immunization Information Systems

Immunization information systems (IIS) are confidential, computerized state- or community-based information systems.

IISs enable public and private health care providers to consolidate and maintain computerized immunization records for their patients. IISs enable authorized health care professionals to access the consolidated information on the immunizations that patients received, help doctors remind parents when their children are due or overdue for immunizations, and recommend vaccines for patients based upon the Advisory Committee on Immunization Practices (ACIP), Recommended Immunization Schedule.

Why We Need Immunization Information Systems

The U.S. now enjoys the highest immunization rates and lowest disease levels ever, but sustaining them is not easy. One of the greatest challenges is the growing complexity and amount of immunization information:

- Over 11,000 children are born each day, each needing 18-22 shots by age six to protect them from vaccine preventable diseases.
- An increasingly complex childhood immunization.
- Families are more mobile than ever before. They relocate, change employers, change insurers, and change health care providers with increasing frequency. This may lead to immunization records that are fragmented between multiple clinics making it difficult to assess whether a patient is up-to-date.
- Immunization information systems help to avoid disease outbreaks by providing accurate, up-to-date information about the immunizations that people receive.

Iowa's Immunization Registry Information System (IRIS)

IRIS is a lifespan, population-based web application containing consolidated immunization records for Iowans. IRIS is able to perform a variety of functions for health care providers, which include:

- Recording immunizations, contraindications, and reactions
- Validating immunization history and providing immunization forecasts for shots due and past due
- Producing recall and reminder notices, vaccine usage and patient reports
- Managing vaccine inventory
- Ordering state supplied vaccine

Iowa's first version of an immunization information system, called ADIOS, began in 1995 and was used only by local public health agencies. In 2001, IRIS was released for use by any enrolled health care provider in Iowa. In 2012, IRIS became a web-based system with many new features.

Access to the web-based system is available through https://iris.iowa.gov. By law, only authorized users are allowed to access immunization information in IRIS. Authorized users include participating health care providers, local public health agencies, hospitals, pharmacies, and schools.

Adults, parents, and guardians are also considered authorized users. Adults may obtain their own immunization record and parents or guardians may obtain their minor child's immunization record by calling the IRIS Help Desk at 1-800-374-3958 or submitting a record request form to the IRIS Help Desk. Record request forms are available on the IRIS login page at https://iris.iowa.gov or on the IRIS web page at http://www.idph.state.ia.us/ImmTB/Immunization.aspx?prog=Imm&pg=Iris.

IRIS allows for electronic data exchange from electronic health records. For specifications on submitting data through Electronic Data Exchange, go to https://iris.iowa.gov, click FORMS, and scroll down to "Data Exchange Specifications".

Chapter 2 System Requirements

In this chapter:

Internet Access
Hardware Requirements
Software Requirements

Internet Access

IRIS is a web-based application. You will need reliable Internet access, preferably with a dedicated high-speed connection. A dial-up connection will also work but is not recommended.

Hardware Requirements

The following are minimum hardware requirements for accessing IRIS:

- Pentium 500 MHz computer
- 64 MB RAM
- 500 MB free disk space
- Screen display set at a minimum of 800 x 600 resolution and 256 colors
- Mouse and keyboard

Software Requirements

The following are minimum software requirements for accessing IRIS:

- Microsoft® Internet Explorer, version 6.0
- Windows® 98 and all subsequent Windows® versions
- Adobe Acrobat Reader® 6.0 or higher

Chapter 3
Accessing IRIS

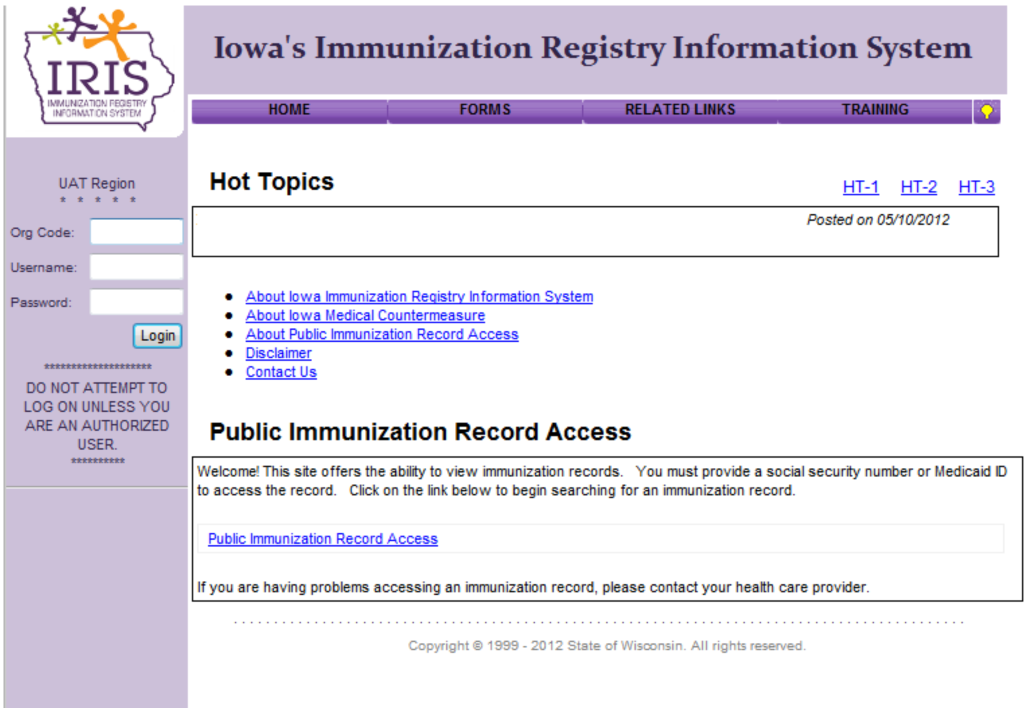
In this chapter:

Opening IRIS
Post Login
Exiting IRIS
IRIS Security

Opening IRIS

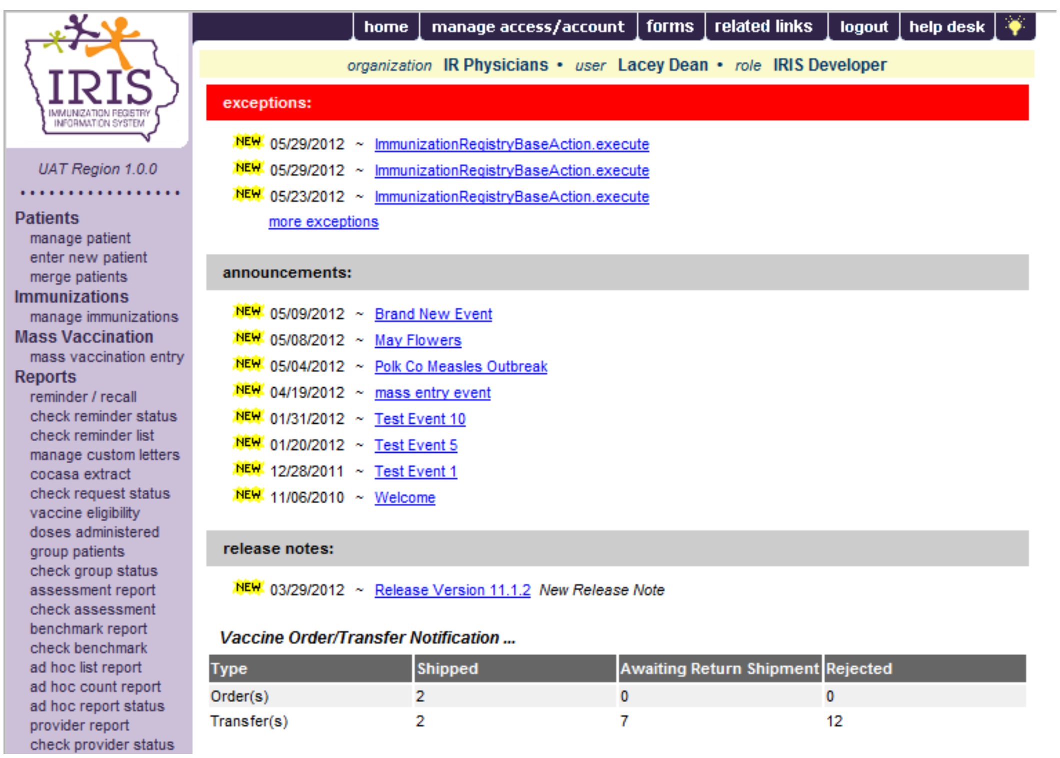
To access the IRIS Web site, follow these steps:

1. Open Internet Explorer.
2. Type the internet address for the IRIS website, https://iris.iowa.gov, in the address box at the top of the browser. Once this page displays, you may want to save this link in your favorites.

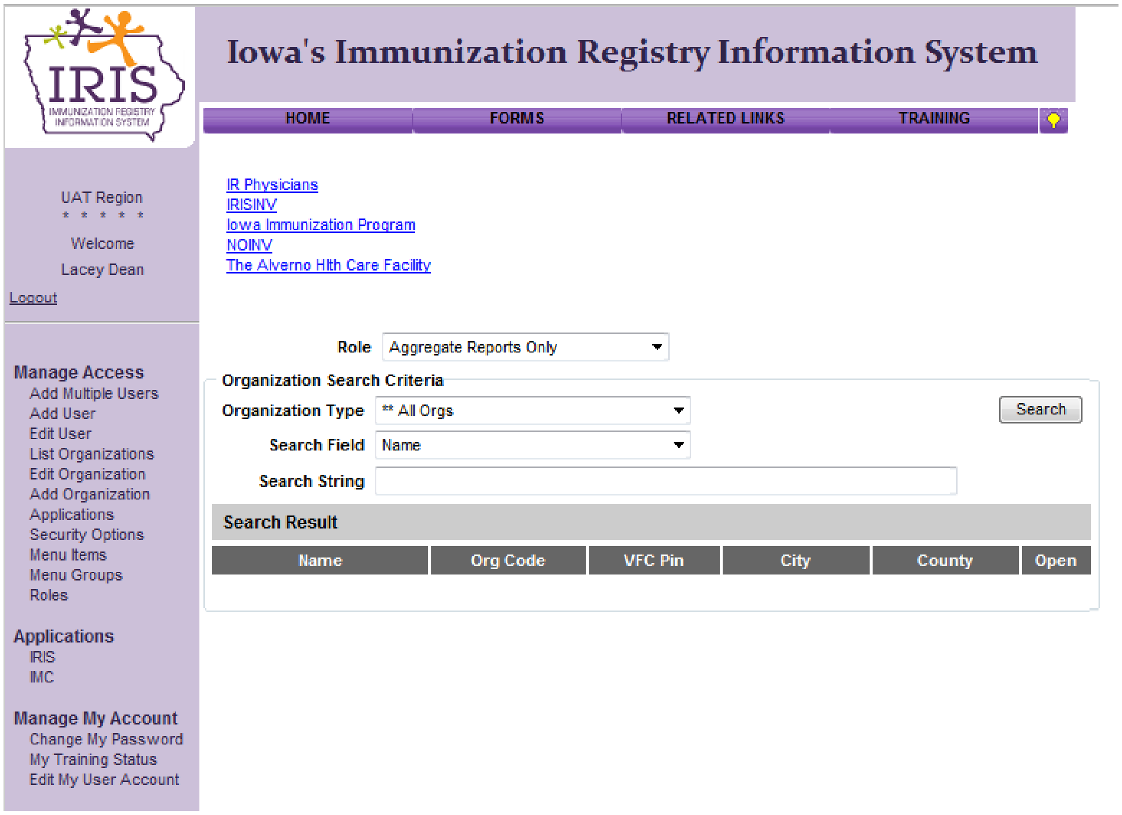


3. On the login page for IRIS, enter your Organization Code (Org Code), Username and Password. Click the Login button. Your clinic's Org Code is available on the IRIS web page at www.idph.state.ia.us/ImmTB/Immunization.aspx?prog=Imm&pg=Iris or contact the IRIS Help Desk at 1-800-374-3958.
4. Depending on your browser, you may receive one or more security/certificate warnings before the browser will open the site. Accept any warnings regarding secure connections or security certificates (click Yes to proceed). Internet Explorer will give you the option of turning off these warnings for future use.

5. The content that displays upon logging into IRIS is determined by your individual user rights.
6. User accounts set up with access to one organization will be taken to the IRIS home page shown below.



7. User accounts set up with access to more than one organization will be taken to the Manage Access/Account screen shown below.



Note: Org Code, Username, and Password are case-sensitive. They must be entered in the exact way you receive them from the IRIS Help Desk.

Post Login

Once in IRIS, you may access the Manage Access/Account screen to switch organizations, manage users, or manage your own account depending upon the specific role that was assigned to you when your account was set up. To do this, click the Manage Access/Account button at the top of the screen in IRIS. The Manage Access/Account screen will display. For more information on the functions available on the Manage Access/Account screen, refer to the Managing Users and Organizations (Chapter 6) and Managing My Account (Chapter 7) of this manual.

Exiting IRIS

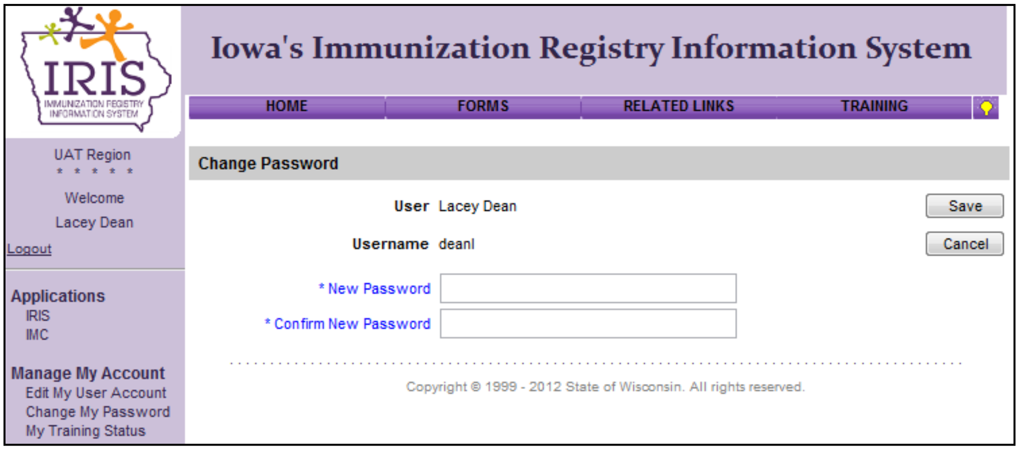
To exit from the IRIS application, click the logout 

button on the menu bar at the top of the screen. You may logout in this manner from any screen within IRIS.

IRIS Security

IRIS provides warning messages after one, two, and three unsuccessful login attempts. Upon the third unsuccessful login attempt, IRIS will lockout the user and require contact with the local system-administrator or IRIS Helpdesk.

You will be required to change your IRIS password every 90 days. IRIS will display the Change Password screen when your password has expired or has been set or reset by your local system administrator or the IRIS Helpdesk.



Note: Each person that will be accessing IRIS is required to have their own user account. IRIS accounts cannot be shared.

Chapter 4 Optimizing IRIS

In this chapter:

Optimizing Browser Performance
Running Reports with Adobe Acrobat® Reader
Efficient Screen Navigation

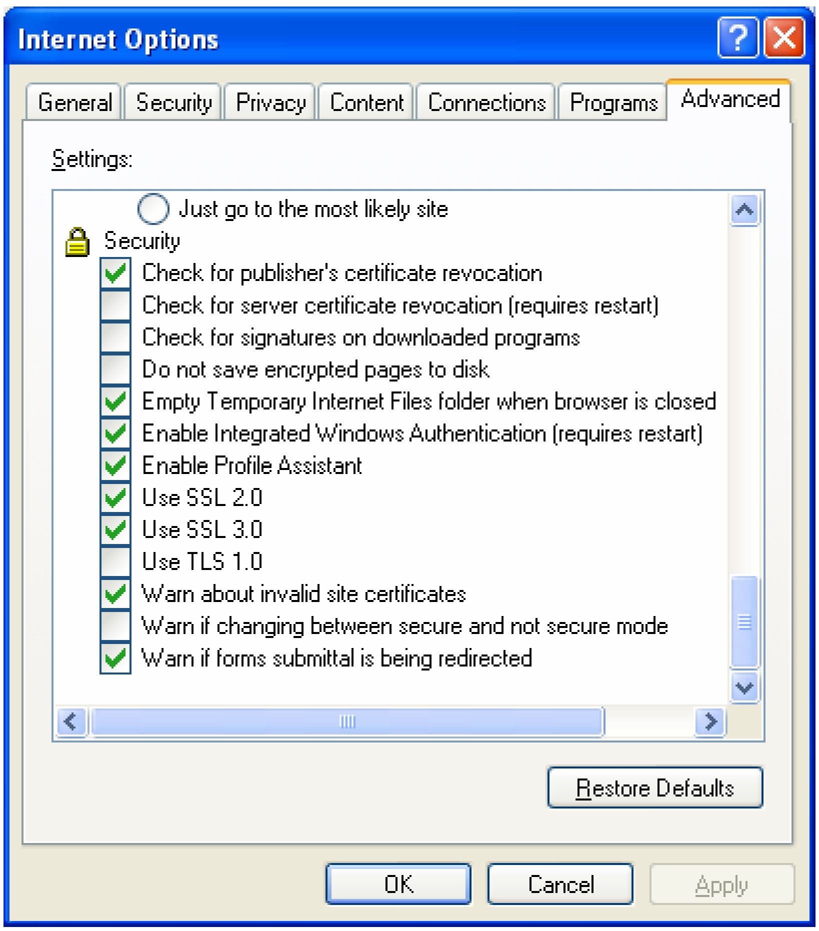
Optimizing Browser Performance

Your Internet browser automatically saves a copy of each new web page visited to the computer's hard drive by default. Over time, these saved files can slow down the browser's performance. This potential problem is avoided by changing browser settings to automatically delete the temporary Internet files each time the browser is closed.

Deleting Temporary Internet Files (Internet Explorer)

To automatically delete all temporary Internet files each time Internet Explorer is closed:

1. Click **Tools** on your browser's menu bar.
2. Click **Internet Options**.
3. Click the **Advanced** tab.



4. Scroll to the **Security** heading and check the box next to the command, "Empty Temporary Internet Files folder when browser is closed".
5. Click **OK**.

Operating in Full-Screen Mode (Internet Explorer)

To view most elements of IRIS with a minimal amount of scrolling, change the browser to full screen mode by pressing F11 on the keyboard. This mode allows minimal browser commands and maximum viewing area for IRIS. To return to normal screen mode, press F11 again.

Running Reports with Adobe Acrobat Reader®

IRIS uses at a minimum Adobe Acrobat Reader® 6.0 to display reports in portable document file (PDF) format. This format allows you to print reports exactly as they appear online.

Running Acrobat Reader® Files

The first time a report is displayed using Acrobat Reader®, a window may appear asking whether you want to run the file or save the file to disk. Click “Run the file” and “Do not display this message again”.

If you try to print a report in Acrobat® and find that some of the text is illegible, choose File, Preferences and General on the Acrobat® menu bar. In the General Preferences dialog box, make sure the “Smooth Text and Images” box is checked.

Problems Running Reports in Acrobat®

If, while using Adobe Acrobat Reader® 6.0, you get a small icon resembling a Rubik’s cube and the report does not display Acrobat Reader® needs to be opened in a separate window. To do this, follow these steps:

1. Click the Start button on the lower left corner of your computer screen
2. Click Programs
3. Click Adobe Acrobat® 6.0
4. On the Acrobat Reader® menu bar, click on File
5. Choose Preferences
6. Choose General
7. Under Options, uncheck Web Browser Integration
8. Click OK

Try to run your report again. If you continue to have problems contact the IRIS Help Desk at (800) 374-3958.

File Transfer Protocol (FTP) Server Access

When running reports and data downloads, IRIS queries a File Transfer Protocol (FTP) server to read the file. If your network has blocked FTP access for any reason, or if FTP was not installed with your browser, you will be unable to run reports or download data. Contact your information technology (IT) staff if you suspect your FTP access is blocked.

Efficient Screen Navigation

Microsoft Windows® often allows users several ways to accomplish certain tasks. Because IRIS runs under Windows®, it also allows users to use these methods to enter data. Learning the shortcuts in this section will help you increase your efficiency when entering data in IRIS, particularly by reducing the number of times you will need to switch from keyboard to mouse. These shortcuts will work in almost all Microsoft® software, not just Internet Explorer.

Keyboard Shortcuts in IRIS

Deleting data: When a field or a portion of a field is highlighted, typing something deletes the highlighted information and replaces it with the characters you typed. If you press the Delete or Backspace key, the highlighted information is deleted. To place the cursor in a specific position within highlighted text, position the cursor where you want it and click the left mouse button once.

Tab: The Tab key advances the cursor to the next field. Internet Explorer moves through the fields in the order specified by the web page. When the cursor reaches the last field, it advances back to the first field on the screen when Tab is pressed.

Shift+Tab: Holding down the Shift key and pressing the Tab key will bring the cursor back to the previous field. In Internet Explorer, the cursor will go back to the previous field defined by the web page.

Enter: In most cases, the Enter key will complete entry of information on the current screen. Most screens have a default button that is activated when the Enter key is pressed — this button could be called Save, Submit, OK, etc. However, you should always confirm that you have clicked the “Save” button if needed to retain any changes or updates you have made to the system.

← (Left Arrow): The left arrow key moves the cursor one character to the left.

→ (Right Arrow): The right arrow key moves the cursor one character to the right.

Ctrl+←: Holding the Ctrl key and pressing the left arrow key moves the cursor one word to the left.

Ctrl+→: Holding the Ctrl key and pressing the right arrow key moves the cursor one word to the right.

Ctrl+A: Holding down the Ctrl key and pressing the A key will select all the text in the current field.

Ctrl+C: Holding down the Ctrl key and pressing the C key will copy all highlighted text in the current field to the clipboard without changing the highlighted field.

Ctrl+V: Holding down the Ctrl key and pressing the V key will insert (“paste”) the contents of the clipboard at the current cursor position.

Ctrl+X: Holding down the Ctrl key and pressing the X key will cut all highlighted text from the current field and place it on the clipboard.

Delete: The Delete key deletes the character to the right of the cursor. If the field is highlighted, all highlighted text is deleted.

Backspace: The Backspace key deletes the character to the left of the cursor. If the field is highlighted, all highlighted text is deleted.

Home: The Home key positions the cursor to the left of the first character in the field.

End: The End key positions the cursor to the right of the last character in the field.

Shift: Using the Shift key in conjunction with any key affecting cursor position will highlight all characters in the field between the starting cursor position and the ending cursor position. For example, if the cursor is at the end of a field and Shift+Home is typed, the cursor is repositioned to the left of the beginning of the field and the entire field is highlighted.

Ctrl: Using the Ctrl key in conjunction with any key affecting cursor position will move the cursor all the way to either end of the field, or the next space in the indicated direction. Using the Ctrl and Shift keys simultaneously not only moves the cursor, but also highlights all text in the field between the starting cursor position and the ending cursor position.

Space: When the cursor is at a check box, the Space bar toggles the check mark on and off.

Mouse Shortcuts in IRIS

Unless otherwise specified, mouse clicks refer to the left mouse button. Internet Explorer automatically positions the cursor in the field specified by the Web page. To position the cursor, click the mouse in the desired field.

Clicking in a field: Clicking in a field will place the cursor in that position.

Double-clicking in a field: When a field contains one character string with no spaces, you may highlight the entire field by double clicking anywhere in the field. If the field contains words separated by spaces, double clicking highlights only the word at which the cursor is pointing.

Triple-clicking in a field: When a field contains words separated by spaces, the entire field may be highlighted by triple clicking anywhere in the field.

Dragging the mouse: To highlight a field, hold down the left mouse button within a field and drag the mouse across the field.

Right-clicking in a field: When you right-click in a field, IRIS displays a pop-up menu with various options. If any items are grayed out, there is either no text currently selected or no text is currently on the clipboard. The pop-up menu or toolbar options are as follows:

Undo: Selecting the Undo option reverses your last action. Undo may be repeated several times.

Cut: Selecting the Cut option deletes all highlighted text in the current field and places it on the clipboard.

Copy: Selecting the Copy option duplicates all highlighted text in the current field on to the clipboard without changing the highlighted field.

Paste: Selecting the Paste option inserts the contents of the clipboard into the current field.

Delete: Selecting the Delete option removes the highlighted text without placing it on the clipboard.

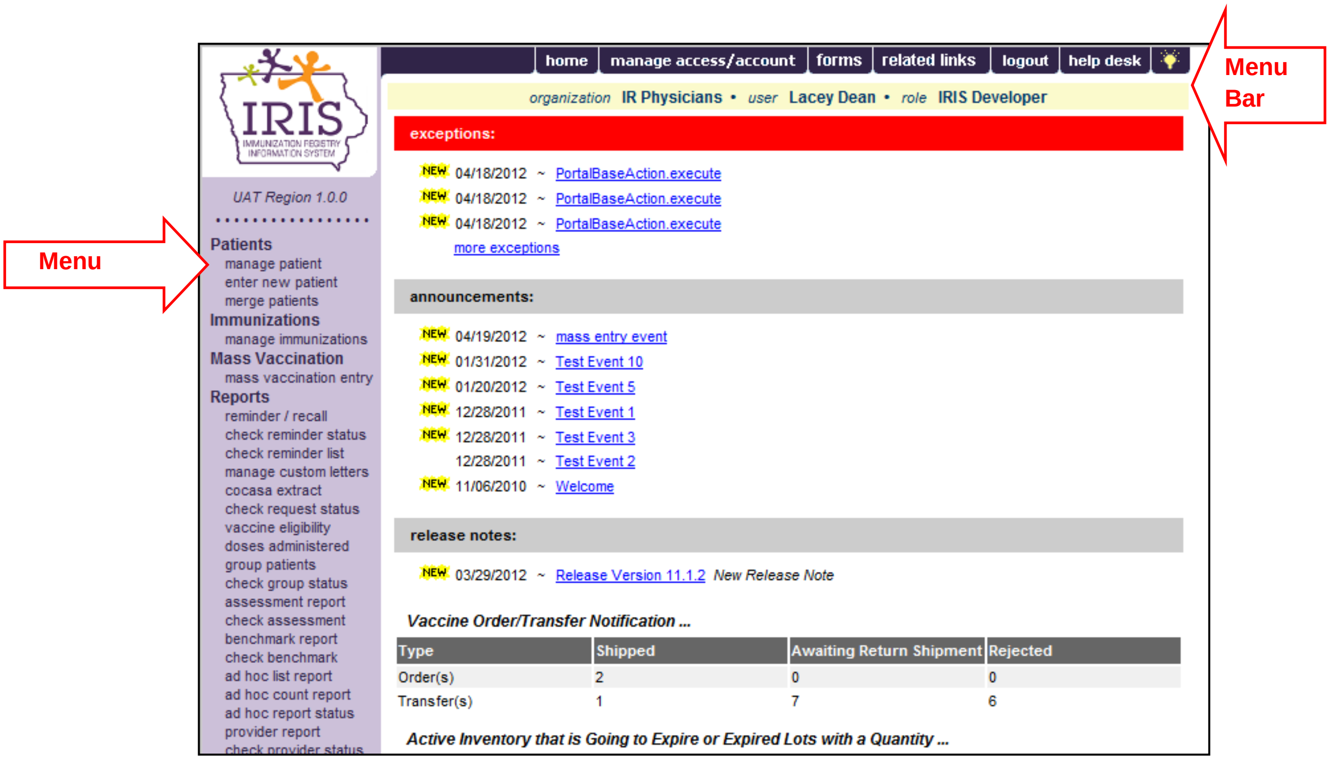
Select All: Selecting the Select All option highlights all text in the current field.

Chapter 5
Home Page

In this chapter:

To access the IRIS home page please follow the instructions outlined in the Chapter 3 of the IRIS User Manual.

The home page of IRIS is divided into several sections. It may be necessary to use the vertical scroll bar to the right of the IRIS screen to view all sections of the home page.



Menu Bar

At the top of the page, you have several menu options. These menu options will appear on every page within IRIS. The options available are the following:

Home: Clicking this menu option will return you to the IRIS home page from anywhere in the application.

Manage Access/Account: Clicking this menu option will bring you to the Manage Access/Account page. Here you may switch organizations, manage your account, manage access to other accounts, and manage training. Refer to Managing Users and Organizations (Chapter 6) and Managing My Account (Chapter 7) of this manual for more information on these functions.

Forms: Clicking this menu option shows a list of hyperlinks for printing blank forms and supporting documentation: user manual, data exchange specifications, site and user agreements, parent information, and policies.

Related Links: Clicking this menu option displays links to other web sites that contain information of interest to the immunization community.

Logout: Clicking this menu option will log you out of your current IRIS session. You may logout from any screen within IRIS. The system then gives you the option to return to the Portal page to login to IRIS.

Help Desk: Clicking the Help Desk menu option will give you a screen with contact information for the IRIS Help Desk.

Online Help: Clicking the light bulb brings up page-specific help. Refer to the Appendix of this manual for more information about online help.

Directly below the menu bar is a row of information highlighted in light yellow. This row contains your organization’s name, your first and last name, and your role within IRIS for your organization. If any of this information is incorrect contact your organization’s Admin User (or IRIS Help Desk)-The Admin User should refer to Managing Users and Organizations (Chapter 6) for instructions on revising organization and user information.

Menu Panel

The menu panel is purple and appears on the left side of all screens within IRIS.

Menu Selections

These links are used to navigate the IRIS application. They are grouped under categories such as: Patients, Immunizations, Reports, Inventory and others. To perform a particular function in IRIS click on the appropriate link. Your role will determine your access to these functions.

Announcements

The center portion of the home page contains important information on enhancements and maintenance relating to IRIS. Announcements that have not been viewed will be marked “New”. To view a full announcement:

1. Click the underlined announcement title. The IRIS Announcement screen will display the details and the posting date.
2. Click the Return to Main Page link to return to the home page.

Release Notes

Release Notes are found under the Announcements section of the home page. This section contains information regarding new releases of IRIS. Release notes may be viewed in the same manner as Announcements.

Inventory Alerts

The inventory alerts section will appear on the IRIS home page under the Release Notes section. This section consists of four tables.

- The first table, *Vaccine Order/Transfer Notification,* lists orders/transfers that have been shipped, are awaiting return shipment, or have been rejected.
- The second table, *Active Inventory That is Going to Expire or Expired Lots with a Quantity*, lists vaccines that are going to expire (within 30 days is the default setting) as well as lots which have expired and still have a quantity.
- The third table, *Inventory that is Running Low by Vaccine Group*, lists inventory that is nearly depleted by vaccine group.
- The fourth table, *Inventory that is Running Low by Trade Name,* lists inventory that is nearly depleted by trade name.

Chapter 6
Managing Users and Organizations

In this chapter:

The Manage Access function allows the IRIS System Administrator (state level) and Admin User (clinic level) to add and update information on both users and their organization(s).

Standard Users are able to update their own user information using the Manage My Account function. See Chapter 7 of this manual for more information.

User Roles

IRIS is set up to accommodate a variety of user types. Each user will have access to certain features in the application based on the role that is assigned. The roles or levels of access for IRIS are as follows:

	Patient Query Only	School Access	Standard User	IRIS Admin (Org)	IRIS System Administrator (IDPH only)	IRIS Developer (IDPH only)
Query Only	X	X			X	X
School Access		X			X	X
Patients			X	X	X	X
Immunizations			X	X	X	X
Reports			X	X	X	X
Inventory			X	X	X	X
Maintenance				X	X	X
Data Exchange				X	X	X
Admin Support					X	X
Vaccine					X	X
Events					X	X
Mass Vaccination					X	X
System Monitoring						X

	Portal Super User	Portal IRIS System Admin (IDPH only)	Portal IRIS Developer (IDPH only)
Manage Access	X	X	X
Manage Training	X	X	X
Manage Portal		X	X

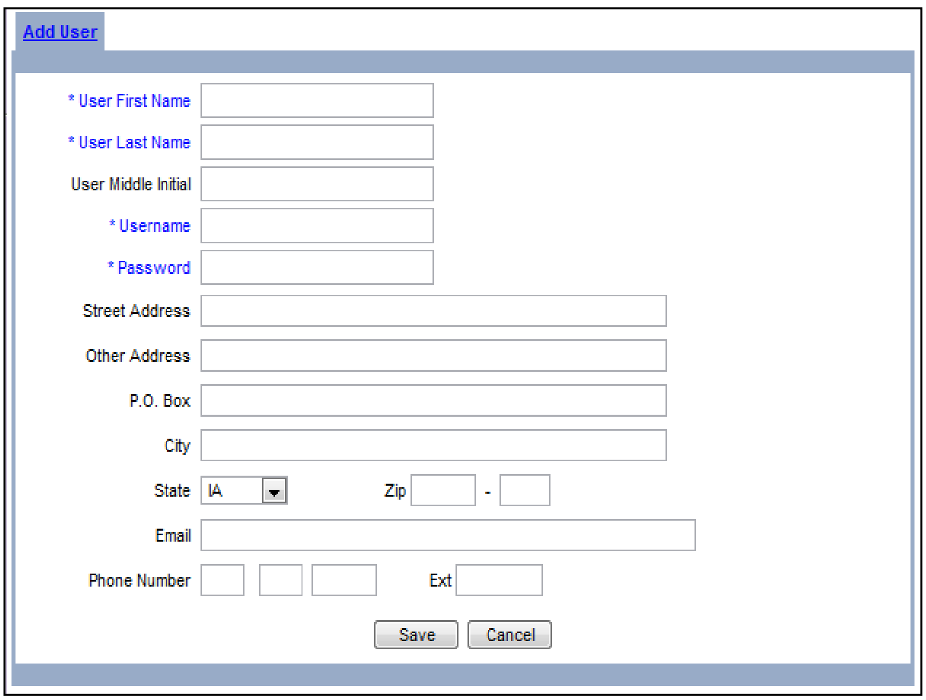
Note: Required fields have asterisks and display in blue text. Input fields not shown in blue are optional, although we strongly recommend that an email address be included in every IRIS user account.

Adding Users

IRIS Admin (Org) users are responsible for adding additional users to their organizations.

To add a user to IRIS:

1. Click the **Manage Access/Account** tab at the top of the IRIS home page.
2. Click **Add User** under the Manage Access section of the menu panel.



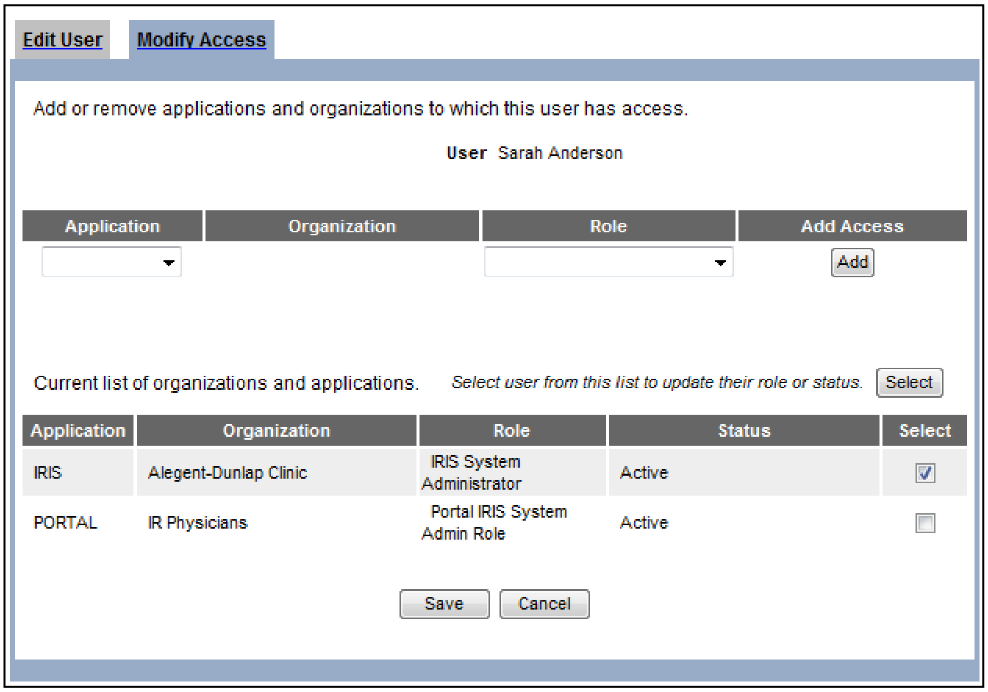
3. You must enter the user’s First and Last Name and assign a Username and Password.
4. Enter additional information if available.
5. Click the **Save** button
6. Once a user is successfully saved in the database, the following message will be displayed at the top of the Edit User screen:

   “User Added, please proceed to the Modify Access Tab. User does not have access until you do.”

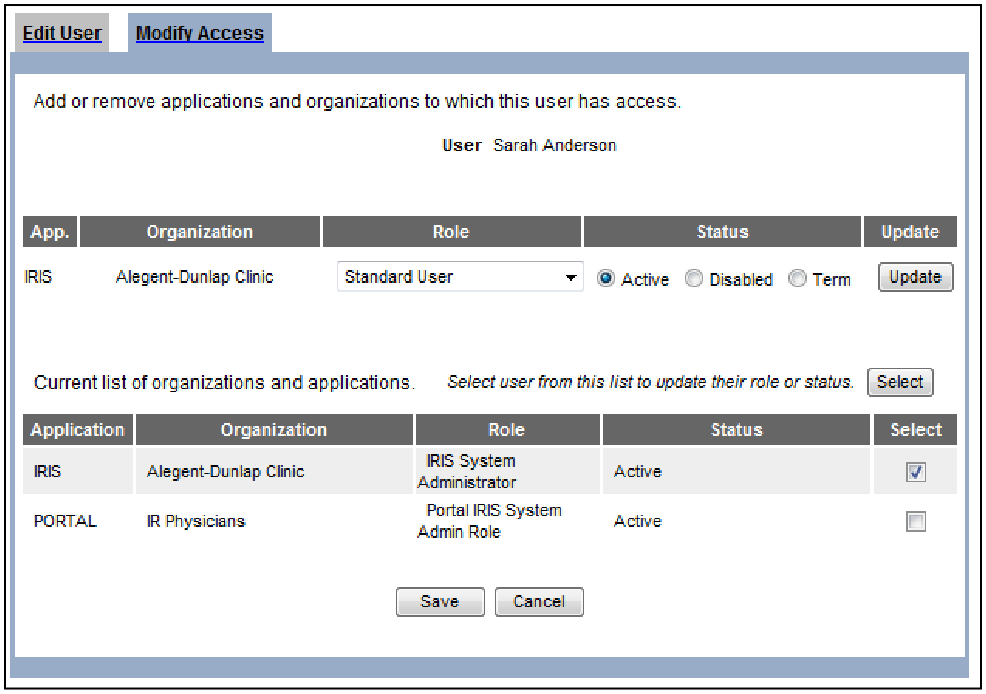
Modifying Access

After adding a user, you must complete the **Modify Access** screen to assign the user access to the appropriate organization. To give a user access:

1. At the Edit User screen, click the **Modify Access** tab.



2. Working left to right, start by selecting the IRIS Application.
3. Select the appropriate Organization type to minimize the Organization drop down list. If Organization Type is unknown leave as “All Types”. If you are an Administrative (org) user for a single organization, you will only have the option of choosing your organization.
4. Select the user’s organization from the drop down list.
5. Select the appropriate role for the new user.
6. Click the **Add** button under Add Access. (For some user roles, a second user role will automatically be added for accessing the Portal Application.)
7. Click the **Save** button when you have finished entering access information for this user.



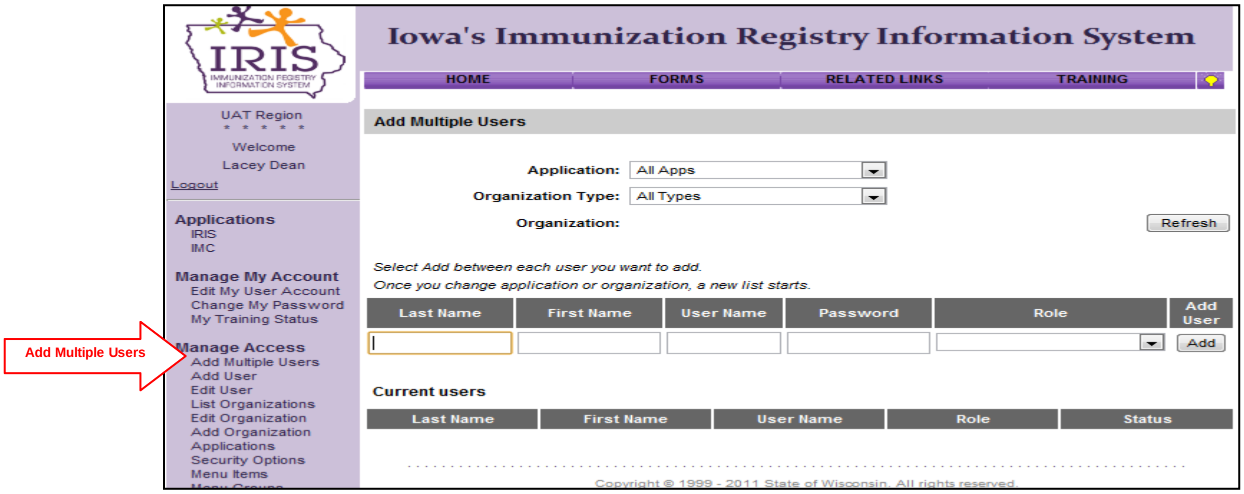
Note: If you give a user access to more than one organization, he or she will need to select a specific organization to access upon logging in.

Adding Multiple Users

Administrative users also have the option of adding multiple standard users at once for their organization. This is the quickest way to set-up standard user accounts. To add multiple standard users follow these steps:

1. Click the **Manage Access/Account** button at the top of the IRIS Home Page.
2. Click **Add Multiple Users** under the Manage Access section of the menu panel.
3. On the Add Multiple Users screen, click IRIS from Application drop-down list and then click your organization's name from the Organization drop down list. You can narrow down this list by selecting an organization type in the Organization Type drop down list. If you do not see your organization's name in this field contact the IRIS Help Desk for assistance.
4. You must enter the First and Last Names, and assign Username, Password, and Role.

5. Click the **Add** button.



6. Follow Steps 3-5 for each additional user.
7. When finished adding the last user, you may return to the IRIS home page by clicking on the IRIS link under the Applications section of the menu panel. Although email address is not available to enter when adding multiple users, we strongly recommend that each individual user navigate to “Edit my user account” and add their email address to their user information.

Note: Org Code, Username, and passwords are case sensitive.

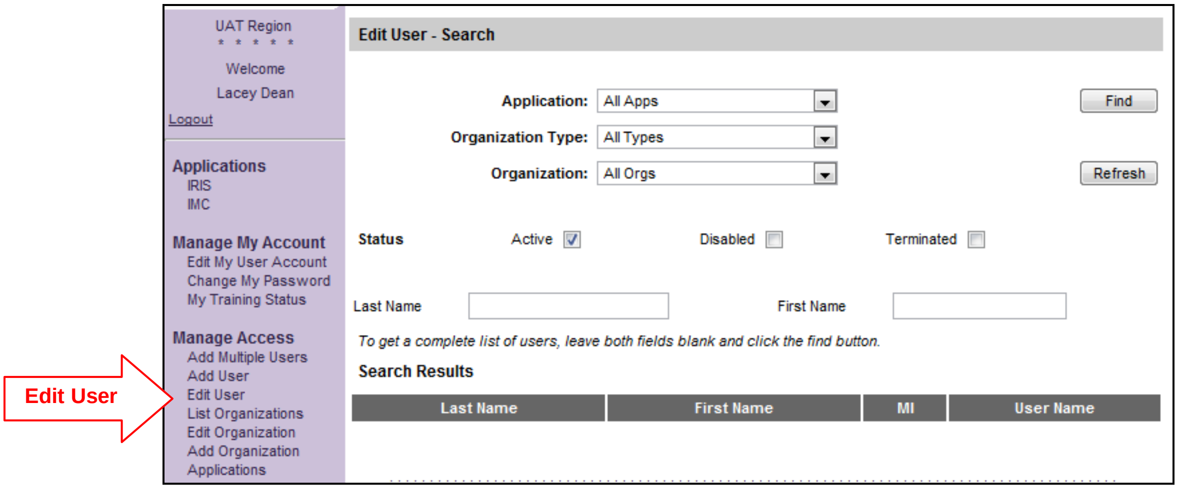
Maintaining Users

IRIS allows Administrative Users to edit user accounts for their organization(s).

Finding Users

To find a user account within your organization:

1. Click the **Manage Access/Account** tab at the top of the IRIS home page.
2. Click **Edit User** under the Manage Access section of the menu panel.



3. At the Edit User - Search screen, select the user's organization from the Organization drop-down list. If you are associated with only one organization, IRIS will default to your organization's name. If you are associated with multiple organizations, select the appropriate organization before moving on to Step 4.
4. Select the Status of the user you are searching for in IRIS. The Status field will always default to Active. This means IRIS will only search and find active users for your organization. If you are searching for Disabled and Terminated user accounts select the appropriate box before moving on to Step 5. If you are unsure of the user's status, select all three.
5. Enter the Last and/or First Name of the user for whom you are searching. Leaving both fields blank will bring up a complete list of users associated with your organization.
6. Click the **Find** button.
7. All names matching the search criteria will be listed under the Search Results portion of the screen. Click the user's last name to display the Edit User page for a specific user.

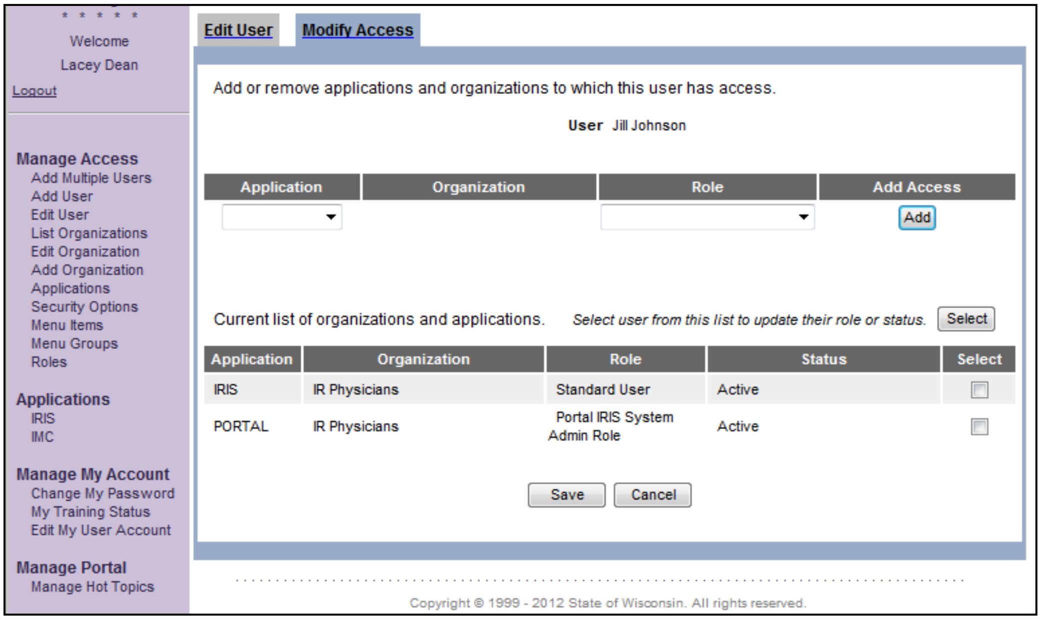
Note: If a user has not accessed IRIS for 90 days or more the user's account is automatically disabled. The Administrative User will need to change the user's status to active on the Modify Access tab.

Editing Users

The Edit User function allows you to change any previously entered information about a user, including their status (active, disabled or terminated). To edit user information:

1. After completing steps outlined above in Finding Users, click the user's last name (which is a hyperlink) to access the Edit User screen. You may also click Edit User on the menu bar, and search for and select a specific user.

2. Edit appropriate user information.
3. Click the **Save** button.
4. Once a user is successfully saved in the database “User Updated” will appear at the top of the Edit User screen.
5. Click the **Modify Access** tab to modify the user’s access.



6. To edit current access, check the **Select** box for the access to be edited. Click the **Select** button.
7. Update the user’s role and/or status for the selected access and click the **Update** button.
8. Once a user’s access is updated, “Update in progress, press Save to keep” will appear within the Modify Access page.
9. Click the **Save** button. “User Updated” displays at the top of the page.

Editing Organizations

Administrative Users may also edit their organization information by:

1. Click the **Manage Access/Account** tab at the top of the IRIS home page.
2. Click **Edit Organization** under the Manage Access section of the menu panel.
3. Click the organization's name you wish to edit (which is a hyperlink).
4. Enter updates to organization information. Display-only fields can only be updated by contacting the IRIS Helpdesk at 1-800-374-3958.
5. Click the **Save** button. The message "Organization Updated" will display at the top of the screen. For additional information regarding editing organizational information, contact the IRIS Help Desk at 1-800-374-3958.

Chapter 7 Managing My Account

In this chapter:

Editing User Information

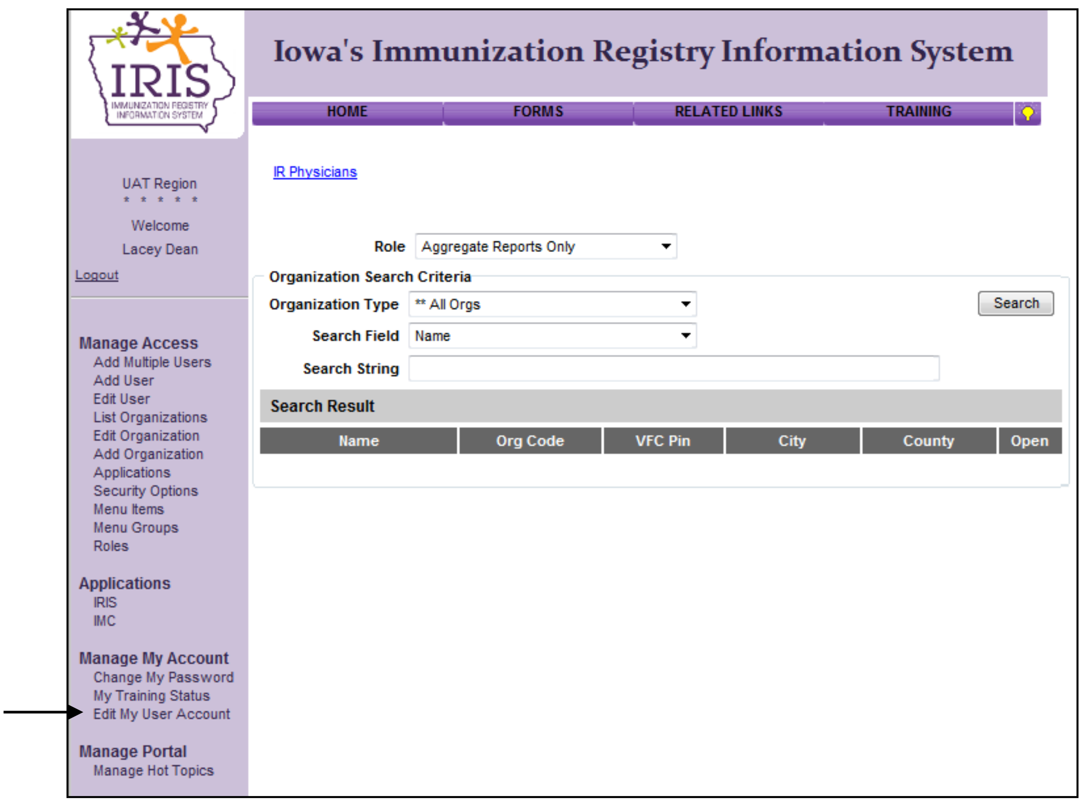
Editing User Information

Editing My User Account

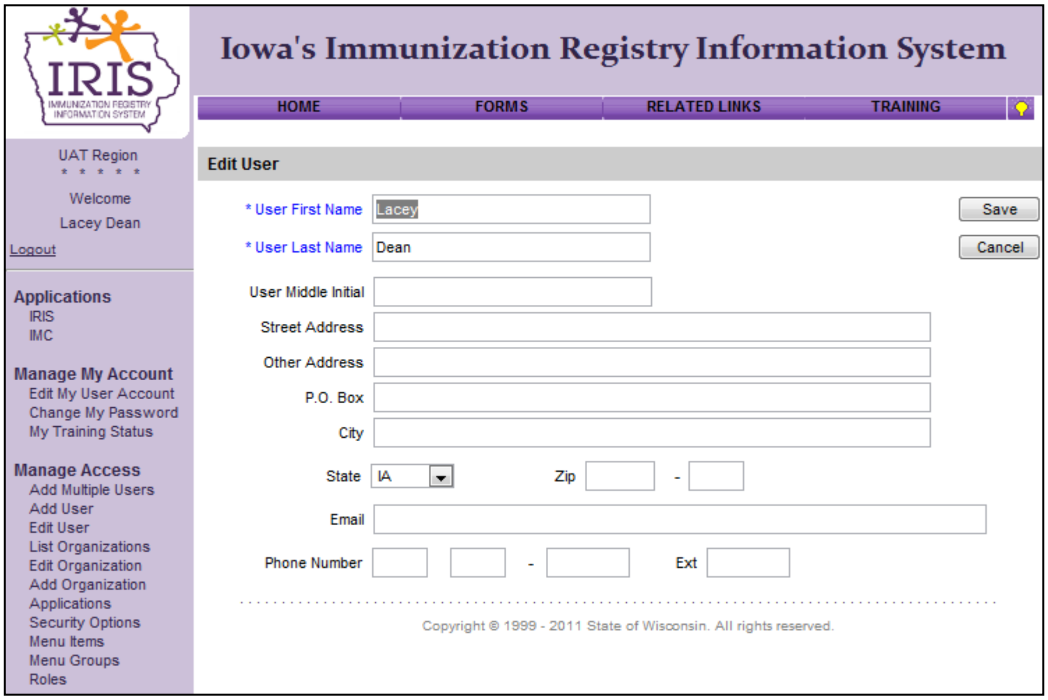
IRIS allows all users to manage their own user account information.

1. Click the **Manage Access/Account** tab on the IRIS home page header.

2. Under the Manage My Account section of the menu panel, click **Edit My User Account**. This displays the Edit User page, as shown below:



3. Edit your first or last name in the appropriate fields. You may also enter or edit any additional fields as necessary. Verify that your email address or business phone number is correct. We strongly recommend that all users maintain a current email address in IRIS.



4. Click the **Save** button. If changes were made the message, “User Updated” appears on the screen.

Note: The first and last name fields on the Edit User screen are required fields, which is why they show in blue with an asterisk.

Chapter 8
Maintenance

In this chapter:

Managing Schools
Managing Physicians
Managing Clinicians

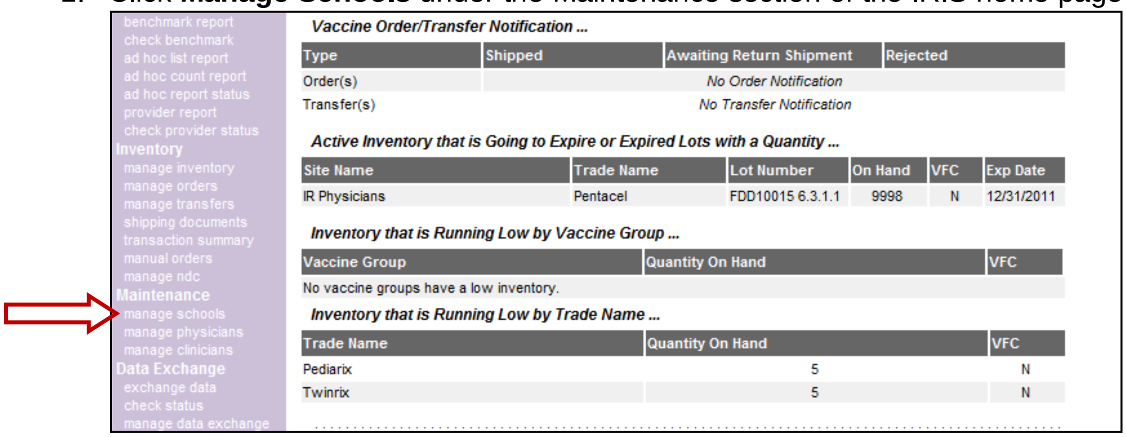
The Maintenance section on the menu panel allows IRIS Admin users to add and update information for schools, physicians, and clinicians. Adding and maintaining this information is optional; however, these components will allow clinics to utilize more functionality within the IRIS (e.g., generating reports specific to a clinic physician, school, etc.).

Managing Schools

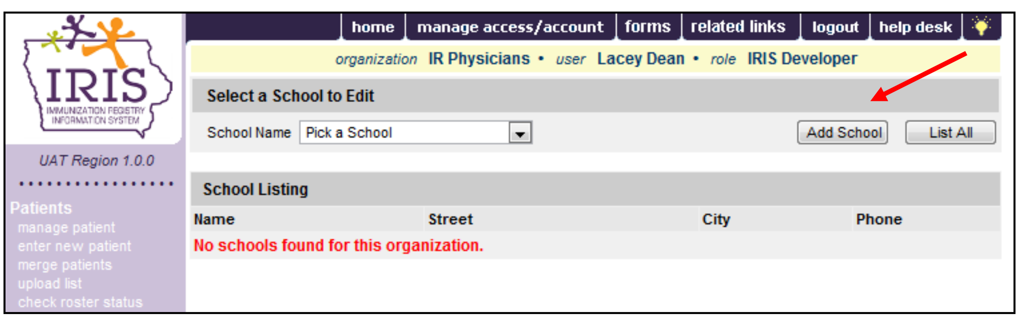
IRIS Admin users may enter schools in their area using the Manage Schools function. Schools entered using this function will be available for selection from a drop down list on the Patient Demographic page. Reports may then be generated by school.

Adding Schools

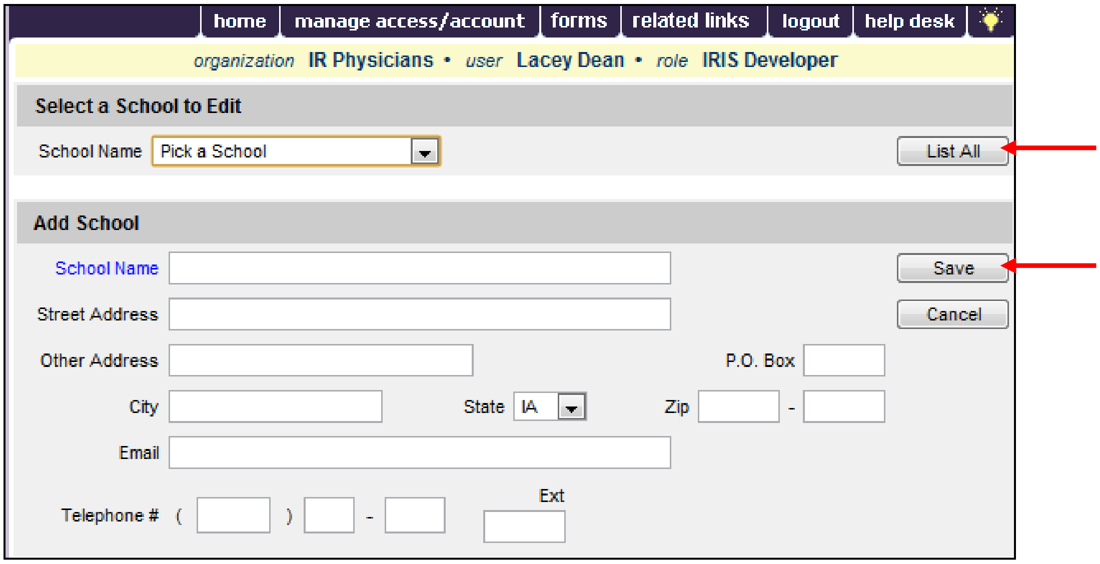
1. Click **Manage Schools** under the Maintenance section of the IRIS home page.



2. Click the **Add School** button on the Manage Schools page.



3. Below the “Add School” header, fill in the name of the school in the appropriate text field. Enter any additional information you wish to supply for the school in the appropriate fields.

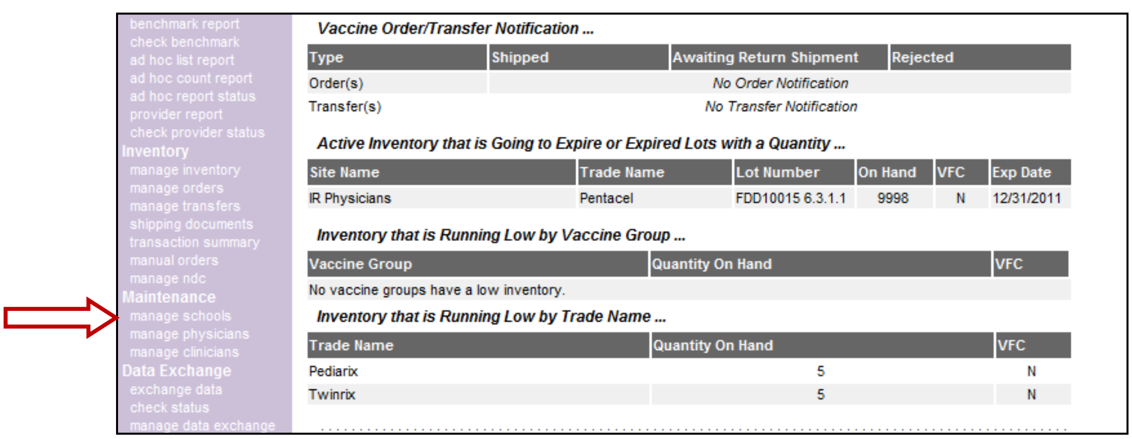


4. Click the **Save** button.
5. Once your school information is successfully saved, “School Added” will appear in the upper right corner of the Edit School box.
6. Click the **List All** button to return to the Manage Schools screen.

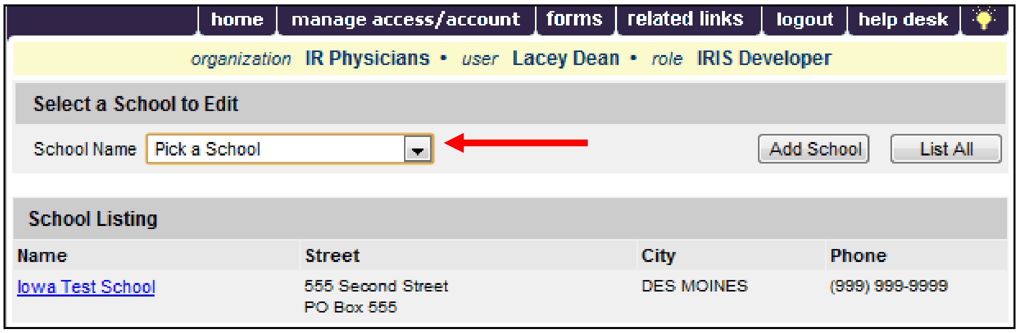
Note: Required fields are shown in blue text.

Editing School Information

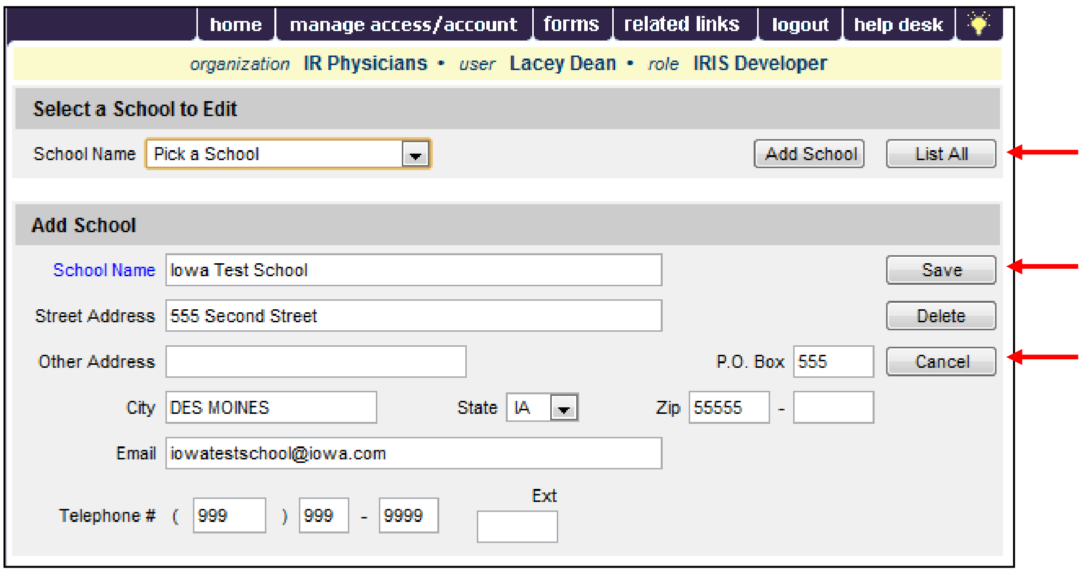
1. Click **Manage Schools** under the Maintenance section of the menu panel.



2. On the Manage Schools page, choose the school whose information you would like to edit from the **School Name** drop down list at the top of the page. You may also click the school’s name in the School Listing at the bottom of the screen.



3. Add or change information in the **Add School** box.

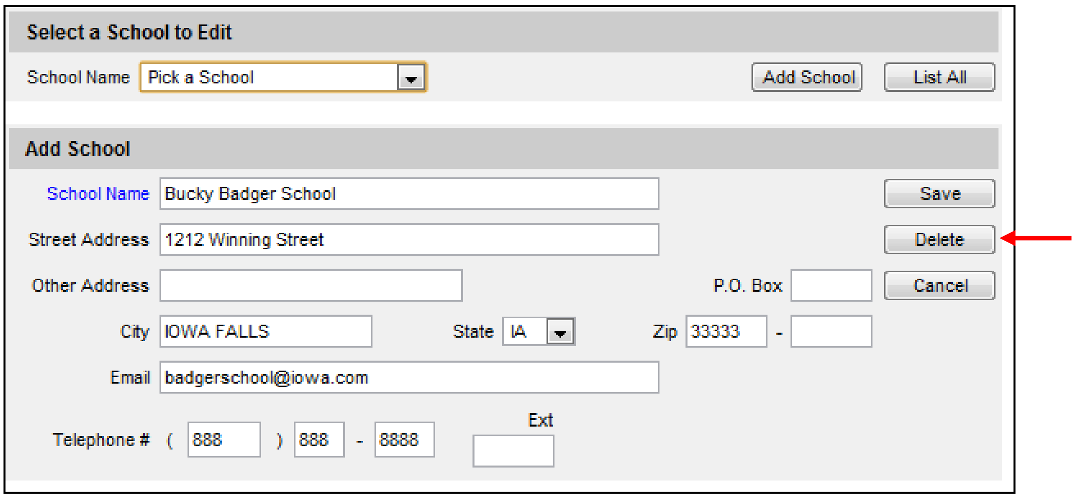


4. Click the **Save** button.
5. Once your changes are successfully saved, “School Updated” will appear in the upper right corner of the box.
6. Click the **Cancel** button twice, or the List All button to return to the Manage Schools screen.

Deleting Schools

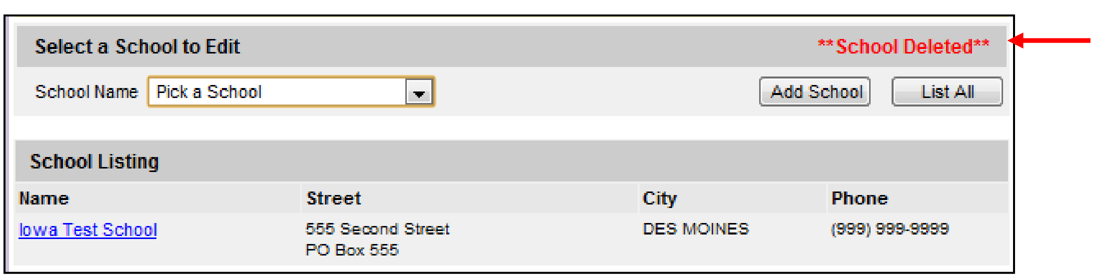
1. Click **Manage Schools** under the Maintenance section of the menu panel.
2. On the Manage Schools page, choose the school whose information you would like to delete from the School Name drop down list at the top of the screen.

3. In the Edit School box, click the **Delete** button.



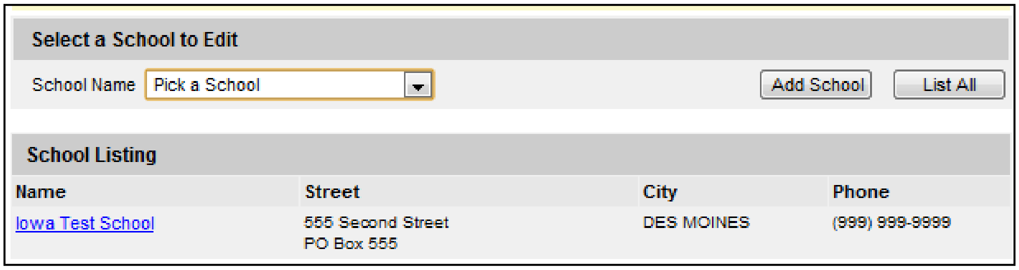
4. A box will open asking if you want to delete this school. Click the **OK** button.

5. IRIS will return to the Manage Schools screen and the message “School deleted” will appear at the upper right corner of the screen.



Listing All Schools

A list of all schools entered into an organization's database may be viewed by clicking the List All button on the Manage Schools page.

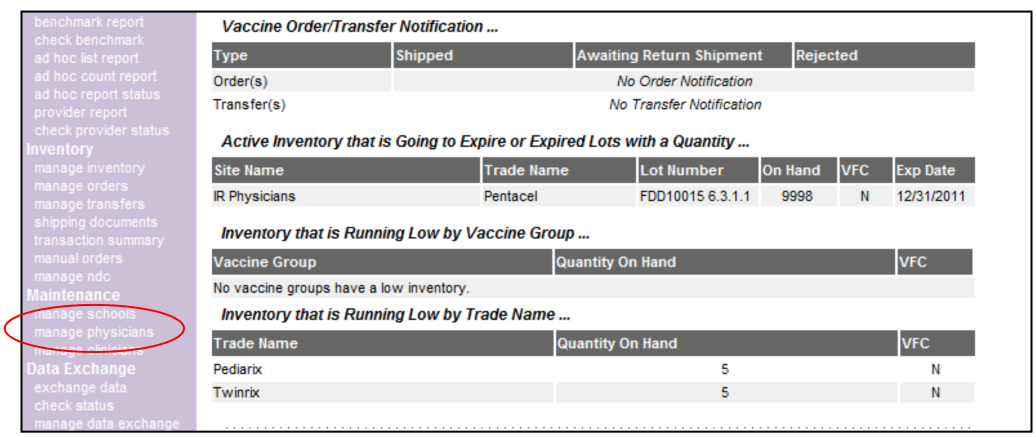


Managing Physicians

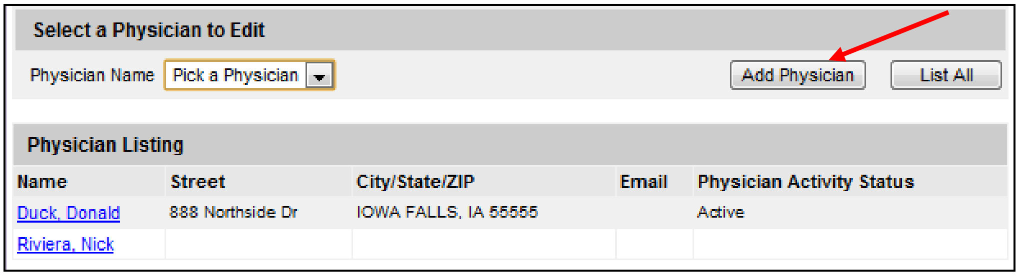
Physicians are considered Primary Care Providers (PCPs) in IRIS.
Admin users can utilize the Add Physician/Edit Physician pages to enter PCPs. Health care organizations or clinic names may also be entered in the Add Physician page. Physicians or health care organizations entered on this page will be available for selection from the Provider-PCP drop-down list on the Patient Demographic page. Reports may then be generated from data for specific providers. For example, reminder recall reports could be run for a specific PCP, rather than for an entire clinic.

Adding Physicians

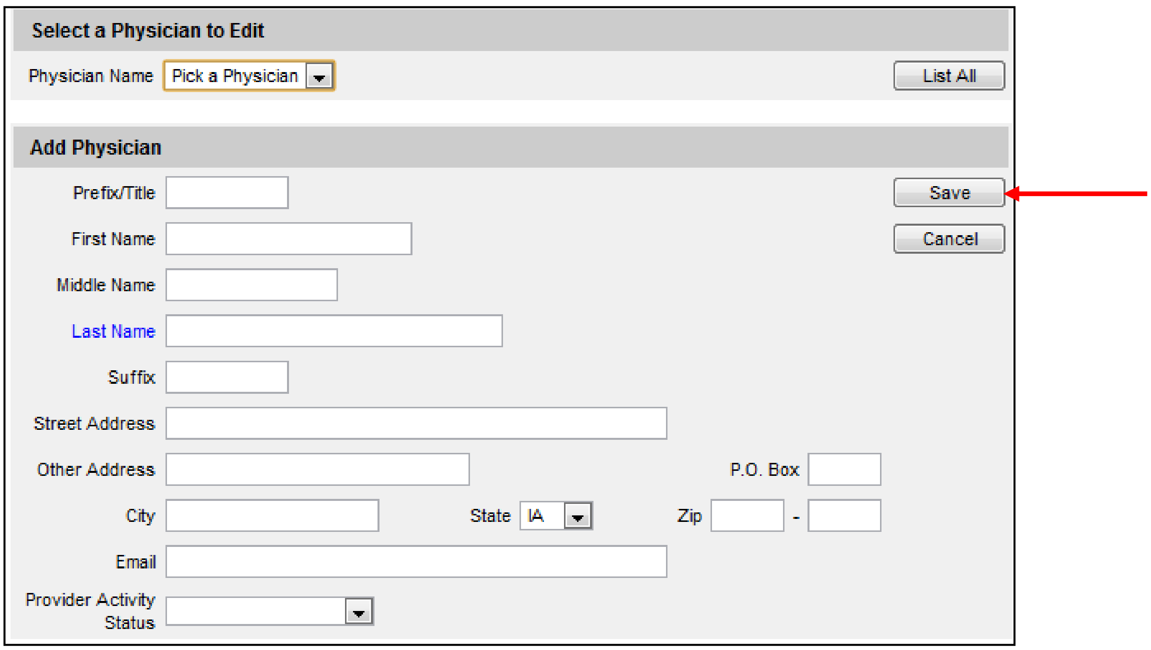
1. Click **Manage Physicians** under the Maintenance section of the menu panel.



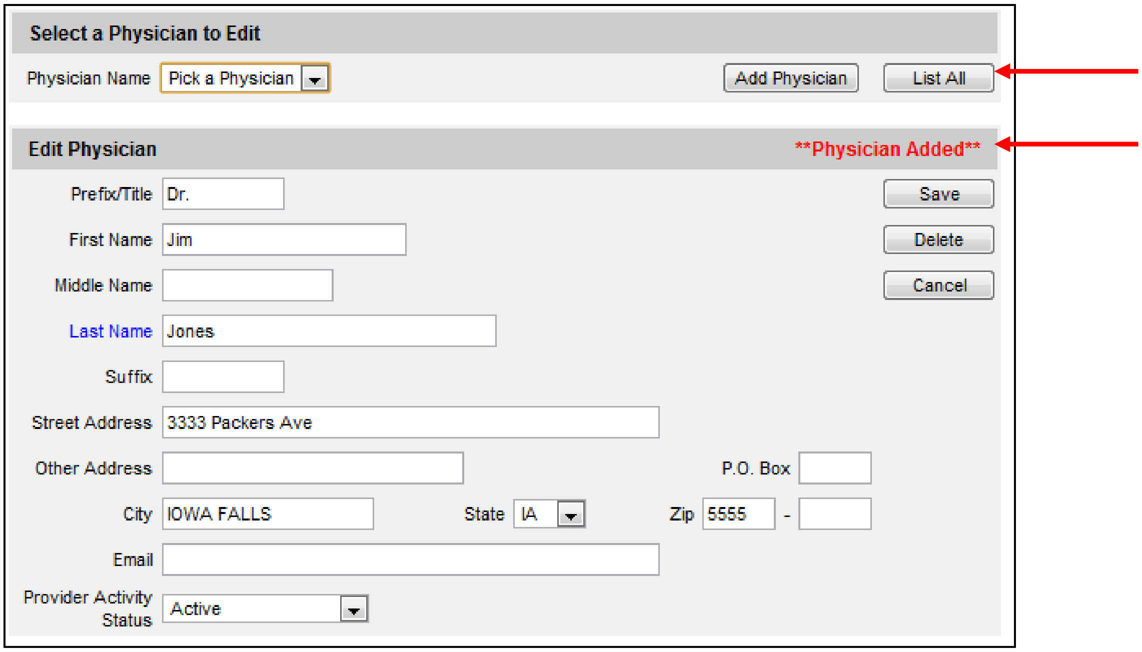
2. On the Manage Physicians page, click the **Add Physician** button.



3. In the Add Physician box, fill in the required field, Last Name, plus any additional information you wish to supply about the physician. To add a clinic name, type the site name in the Last Name field and the location in the First Name field.



4. Click the **Save** button.
5. Once the physician is successfully saved, “Physician Added” displays in the upper right corner of the Edit Physician box.

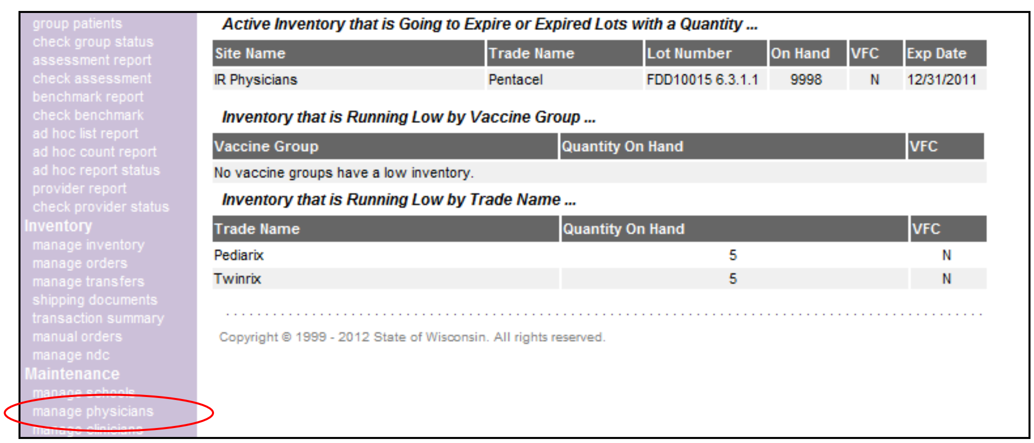


6. Click the **List All** button to return to the Manage Physicians page.

Note: When entering a physician on the Add Physician page, keep in mind that this is a primary care provider associated to the patient, not to a vaccination. Provider-PCP may be used for filtering when running a Reminder/Recall report.

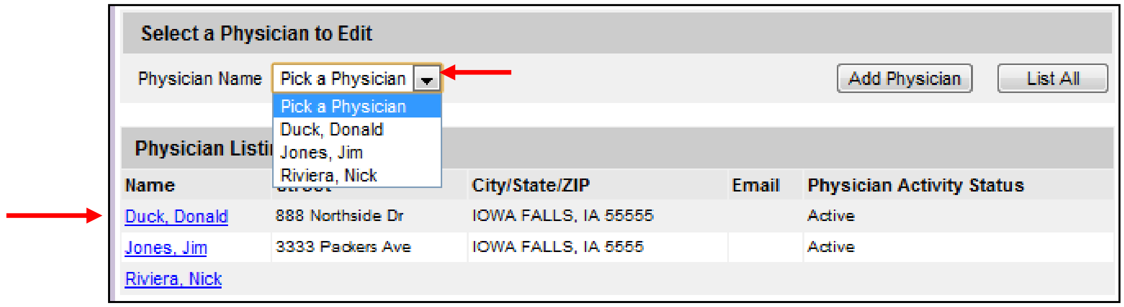
Editing Physician Information

1. Click **Manage Physicians** under the Maintenance section of the menu panel.

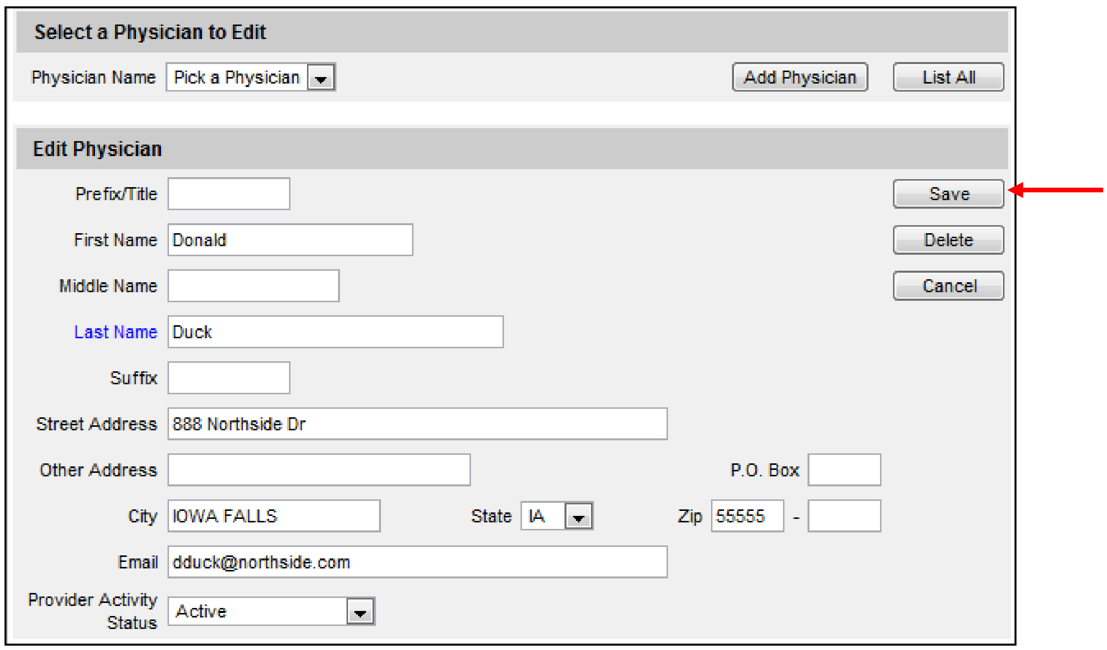


2. On the Manage Physicians page, choose the physician whose information you would like to edit from the Physician Name drop down list at the top of the screen.

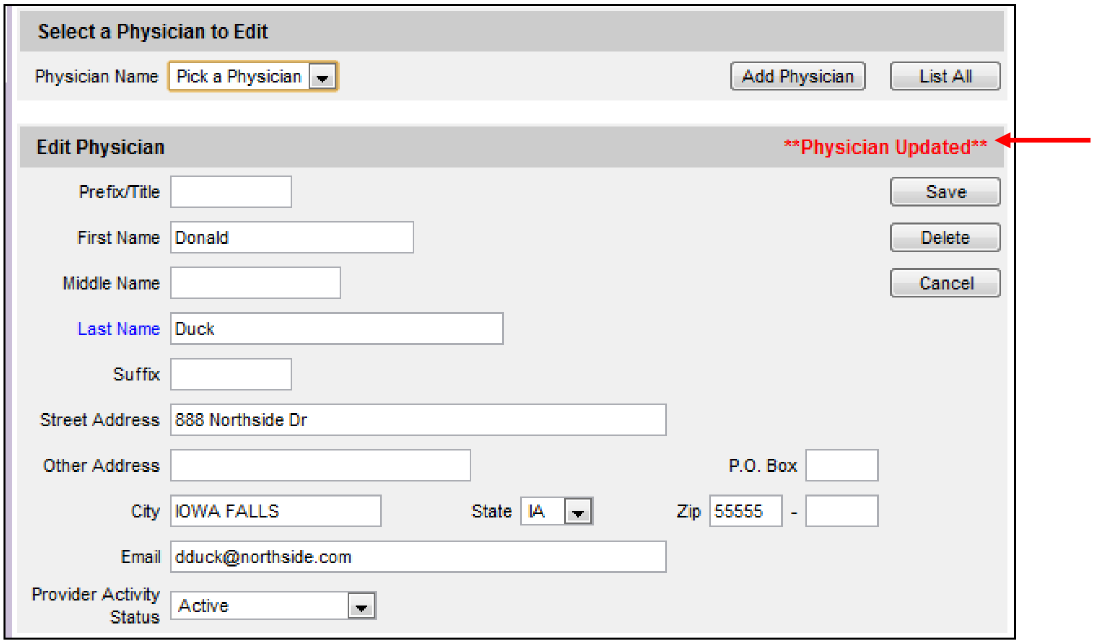
You may also click the physician's name in the Physician Listing at the bottom of the page.



3. Add or change information in the Edit Physician box.



4. Click the **Save** button
5. Once your changes are successfully saved, "Physician Updated" will appear in the upper right corner of the Edit Physician box.

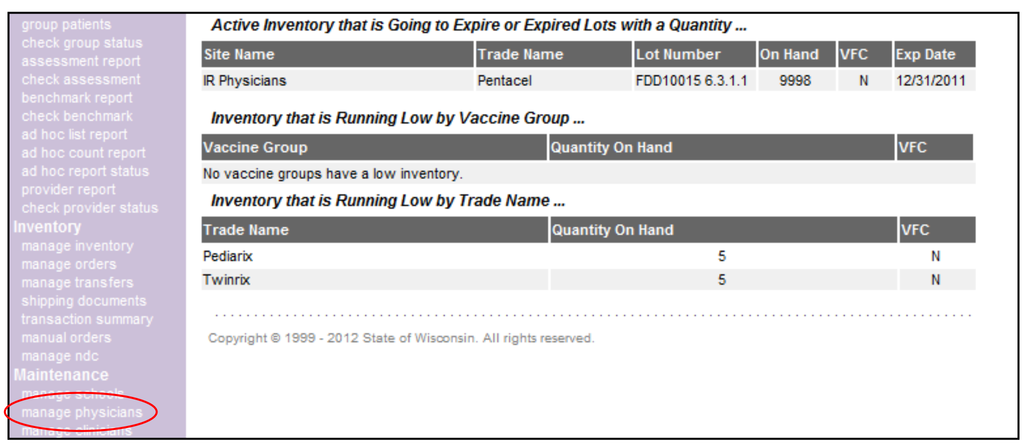


6. Click the **Cancel** button twice, or the List All button to return to the Manage Physicians screen.

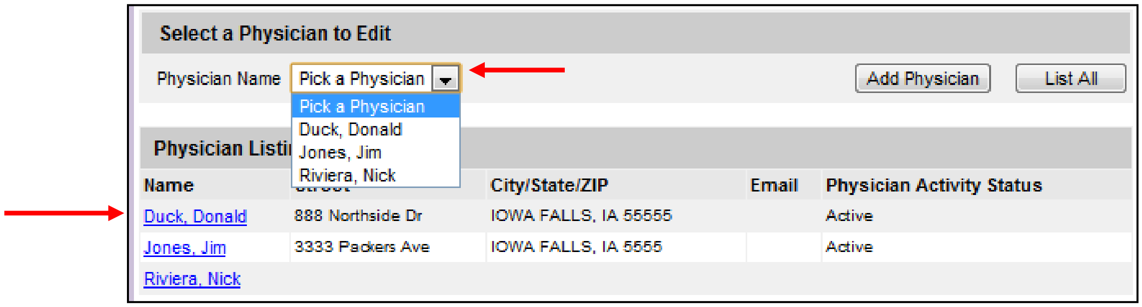
Note: Adding Physicians and Clinicians into your physicians' list does not create an IRIS User Account for them. Please refer to Managing Users and Organizations (Chapter 6), for instructions on adding users into IRIS.

Deleting Physicians

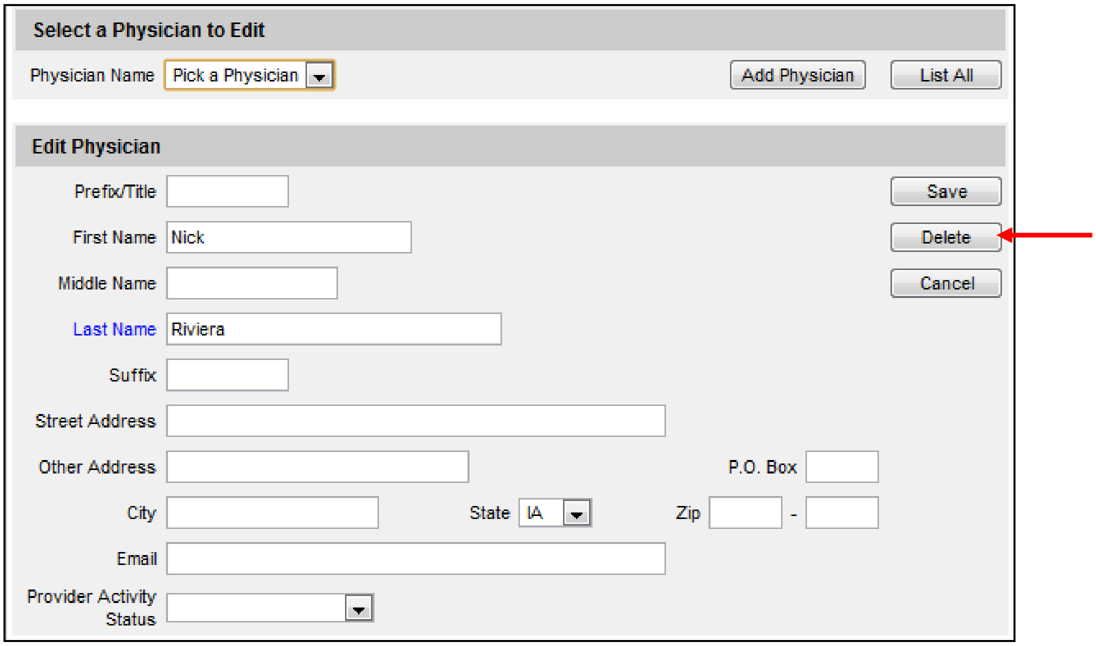
1. Click **Manage Physicians** under the Maintenance section of the menu panel.



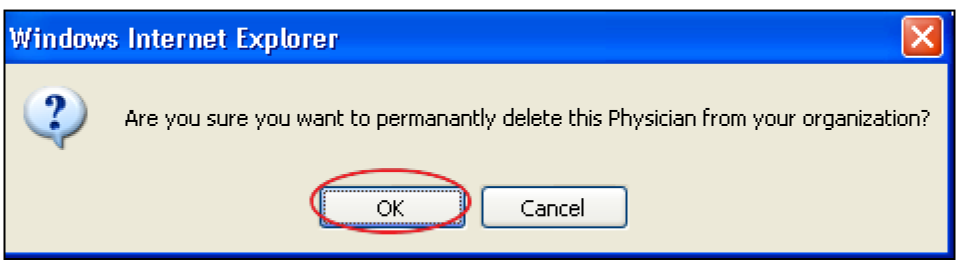
2. On the Manage Physicians page, choose the physician whose information you would like to delete from the Physician Name drop down list at the top of the screen or click on the physician's name in the Physician Listing at the bottom of the screen.



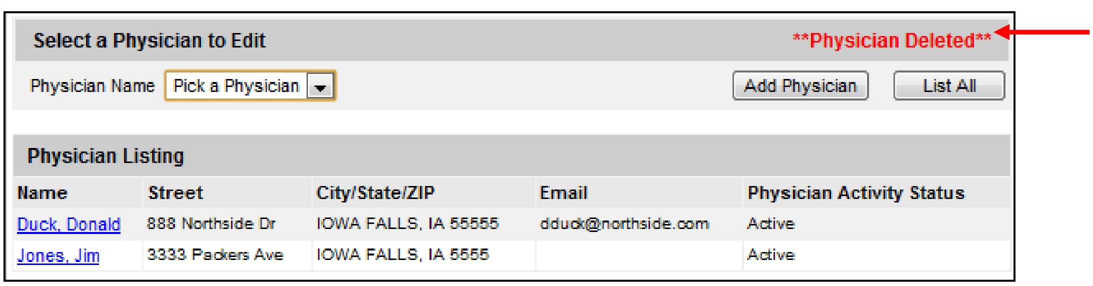
4. In the Edit Physician box, click the **Delete** button.



5. A box will open asking if you want to delete this physician. Click the **OK** button.

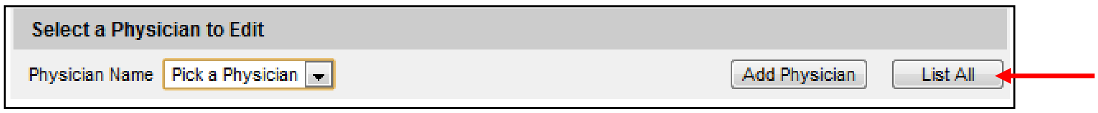


6. Once your changes are successfully saved, “Physician Deleted” will appear in the upper right corner of the Manage Physicians page.



Listing All Physicians

A list of all physicians entered into an organization's database may be viewed by clicking the List All button on the Select a Physician to Edit page.

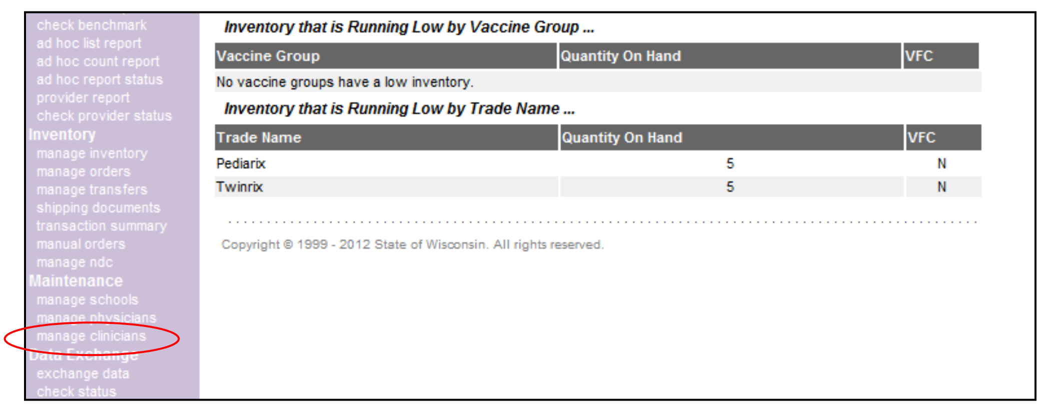


Managing Clinicians

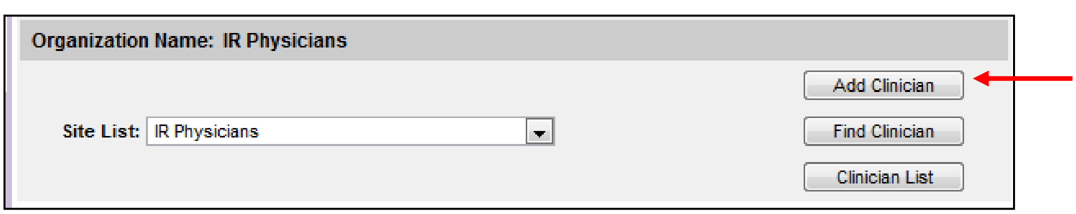
Clinicians are the individuals within the organization who administer vaccines to patients. A clinician may be associated with one or more clinic sites. IRIS Admin users will use the Manage Clinicians function to enter clinicians within the organization. Clinicians added to IRIS through this function will be available from the Administered By drop down list used for recording immunizations.

Adding Clinicians

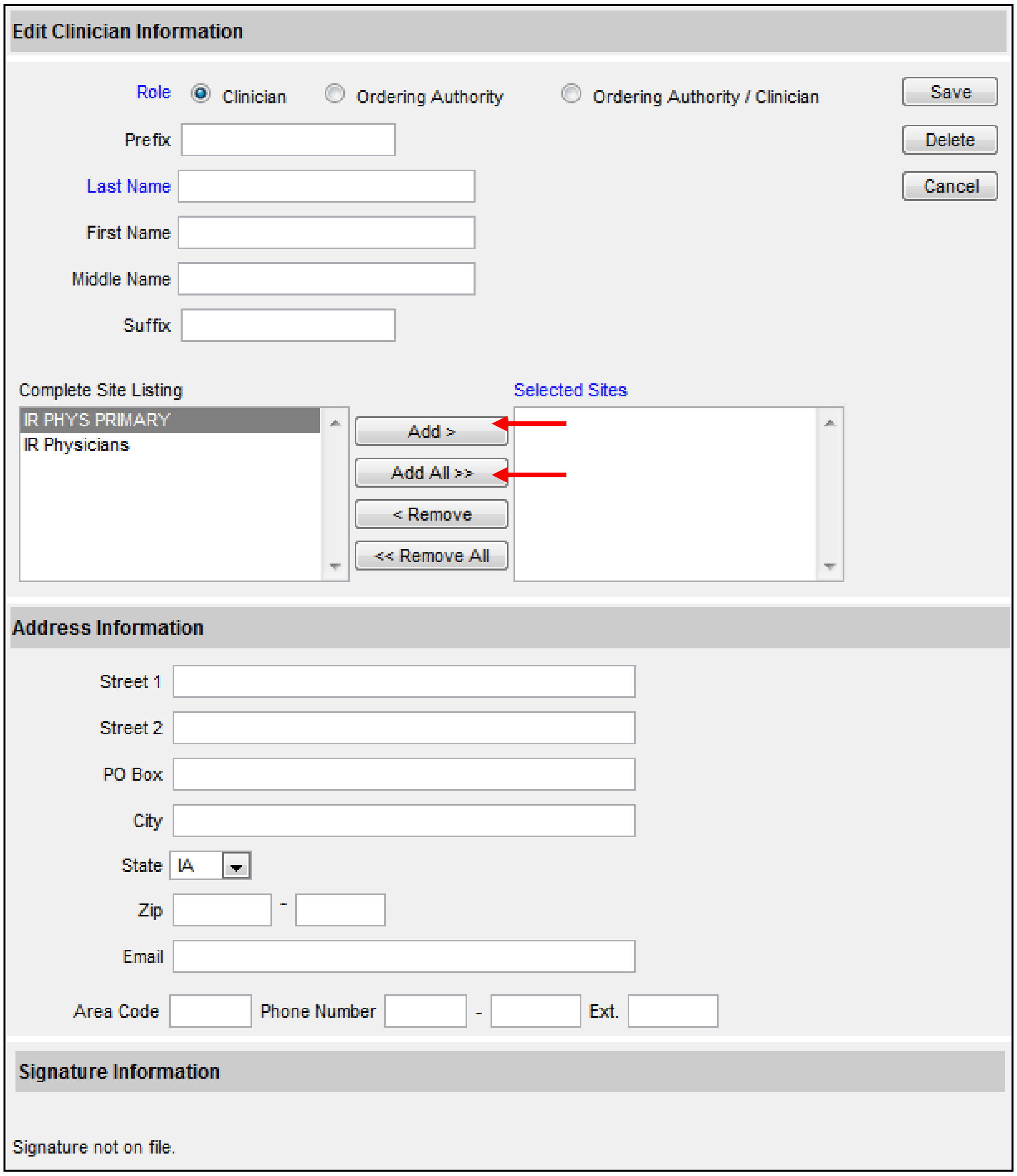
1. Click **Manage Clinicians** under the Maintenance section of the menu panel.



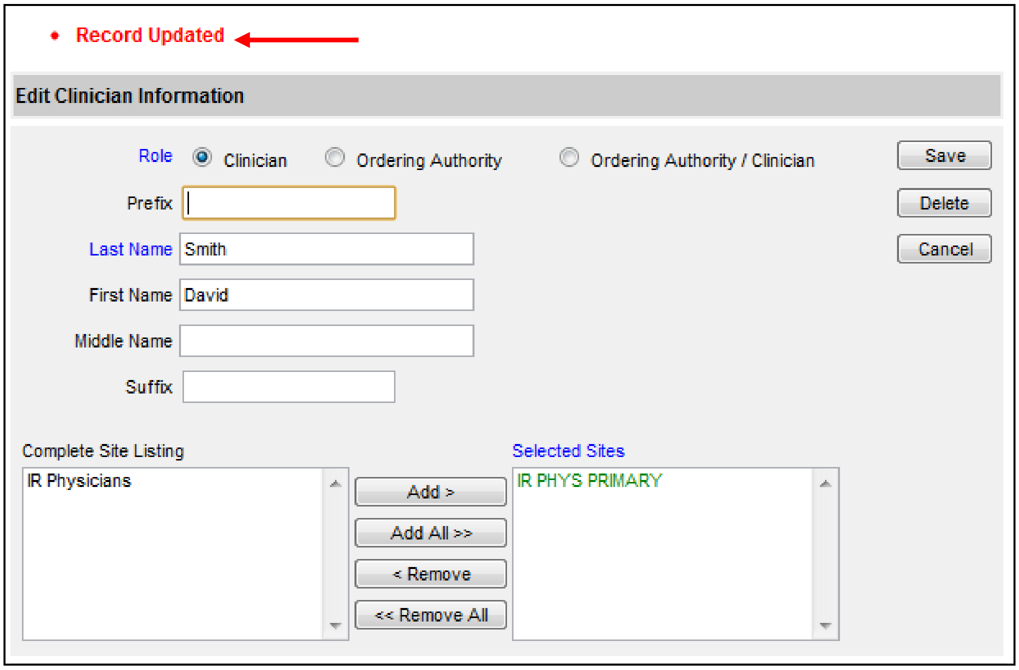
2. Click the **Add Clinicians** button.



3. At the Edit Clinician Information page, choose a role for the clinician.



4. Fill in the Last Name field and any other fields you wish to complete.
5. In the Complete Site Listing field at the bottom of the screen, highlight a site(s) that are associated with the clinician and click the **Add** button. If the clinician is associated with all sites, click the **Add All** button.
6. Click the **Save** button.

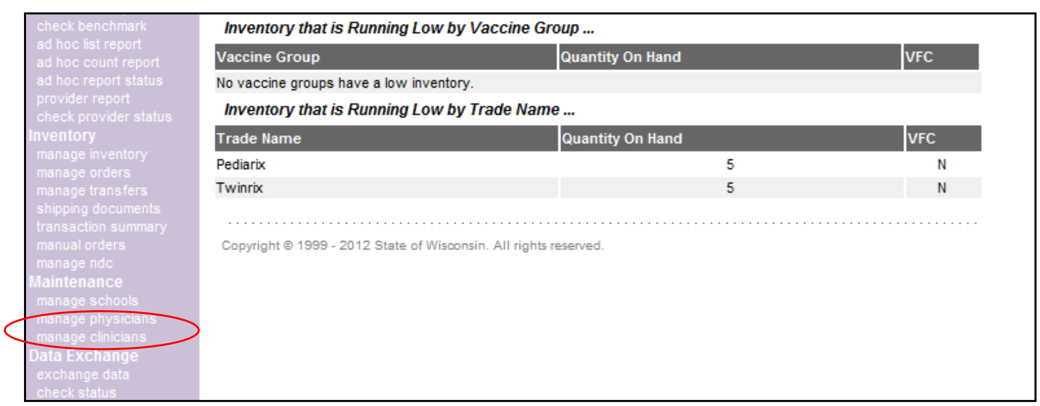


7. After the clinician is successfully saved the message, “Record Updated” will appear at the top of the screen.
8. Click the **Cancel** button to return to the Manage Clinicians page.

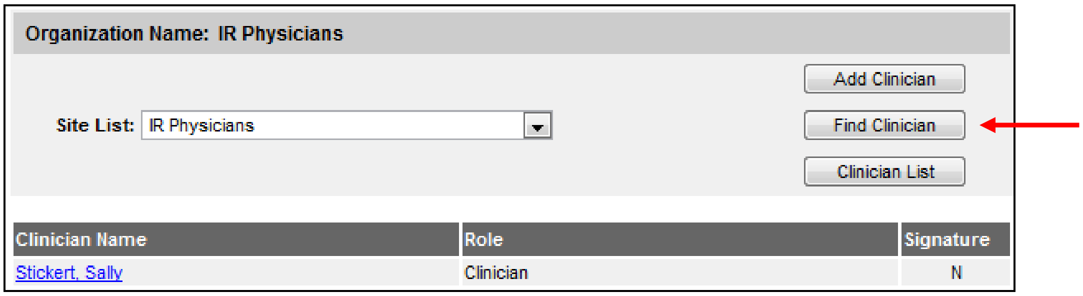
Note: Required fields are shown in blue text. Input fields not shown in blue are optional.

Editing Clinician Information

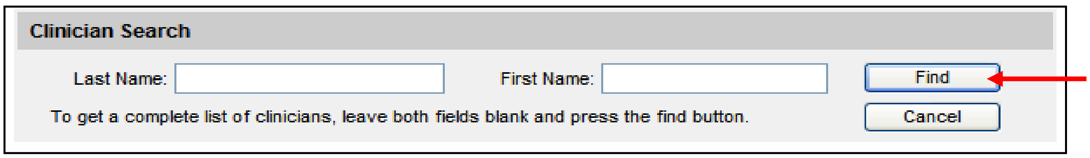
1. Click **Manage Clinicians** under the Maintenance section of the menu panel.



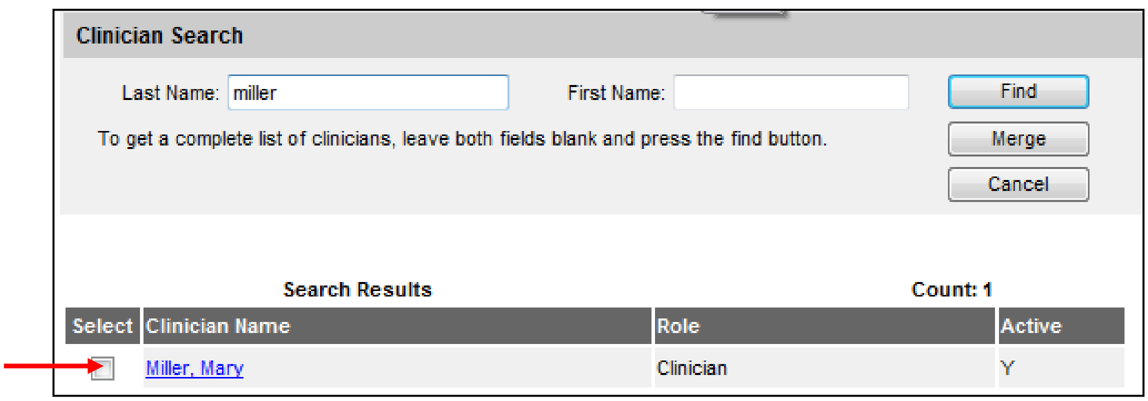
2. Click the **Find Clinician** button or click on the appropriate clinician name at the bottom of the Manage Clinicians screen. If you choose this latter option, skip to Step 4.



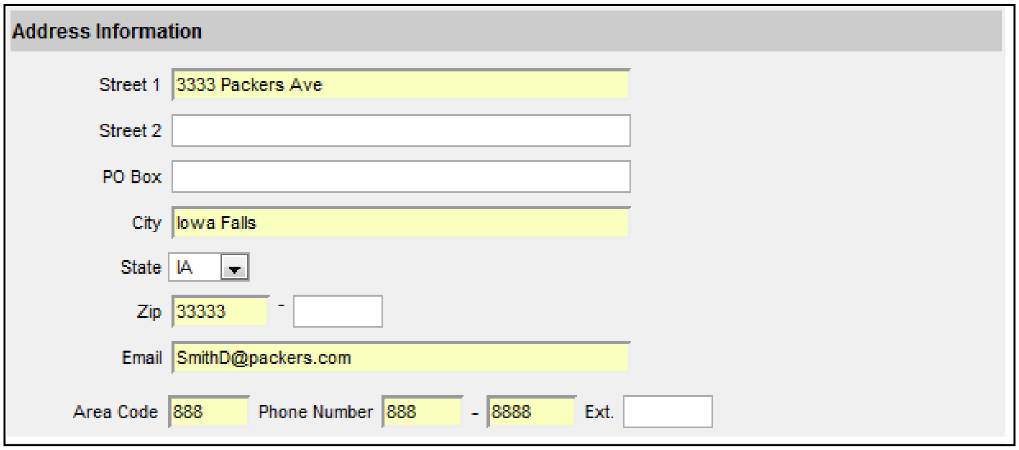
3. At the Clinician Search page, enter the last and/or first names of the clinician and click the Find button. Then, click the last name in the Search Results table. You can also leave both fields blank and click the Find button to display a list of clinicians within the organization.



4. Click the last name of the clinician within the Search Results table to bring up his or her information.



5. Make the desired changes to the clinician's information.
6. Click the **Save** button.
7. Once the clinician's information is successfully updated, the message "Updated clinician: "<last name>, <first name>" will appear at the bottom of the screen.

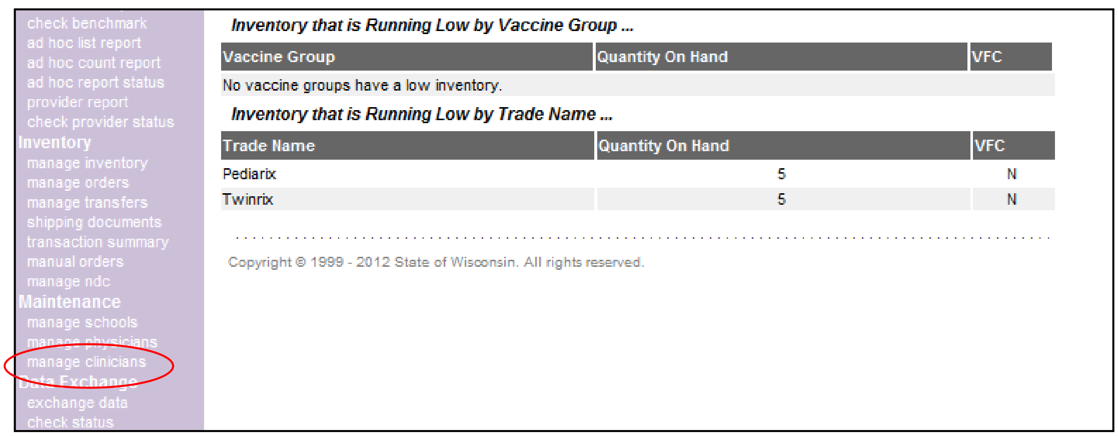


8. To return to the Manage Clinicians page, click the **Cancel** button.

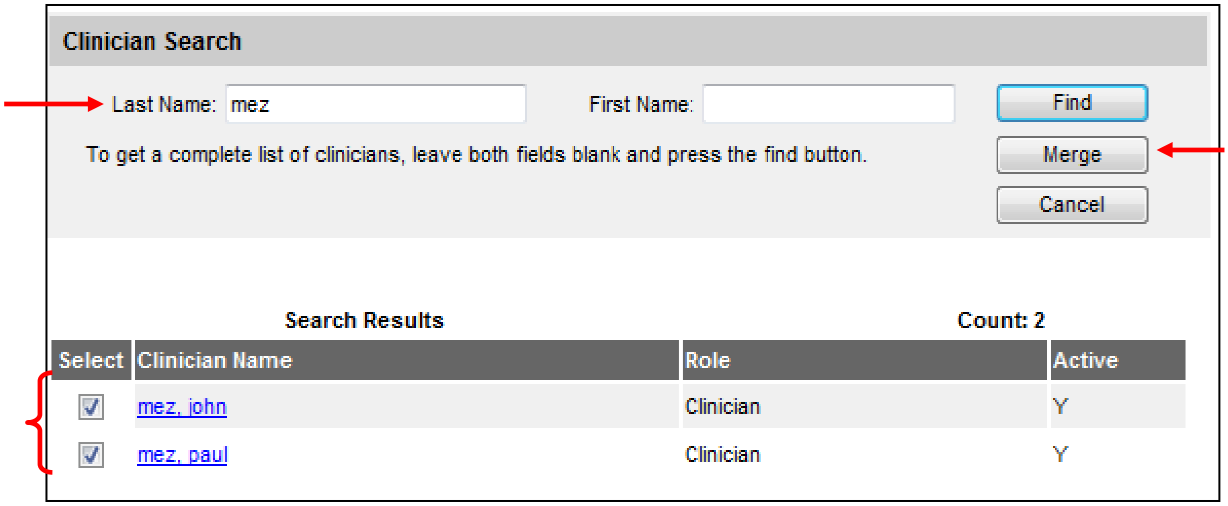
Merging Clinicians

Occasionally clinicians are entered more than once creating duplicate records. To eliminate extraneous records using IRIS merge clinician feature, follow these steps:

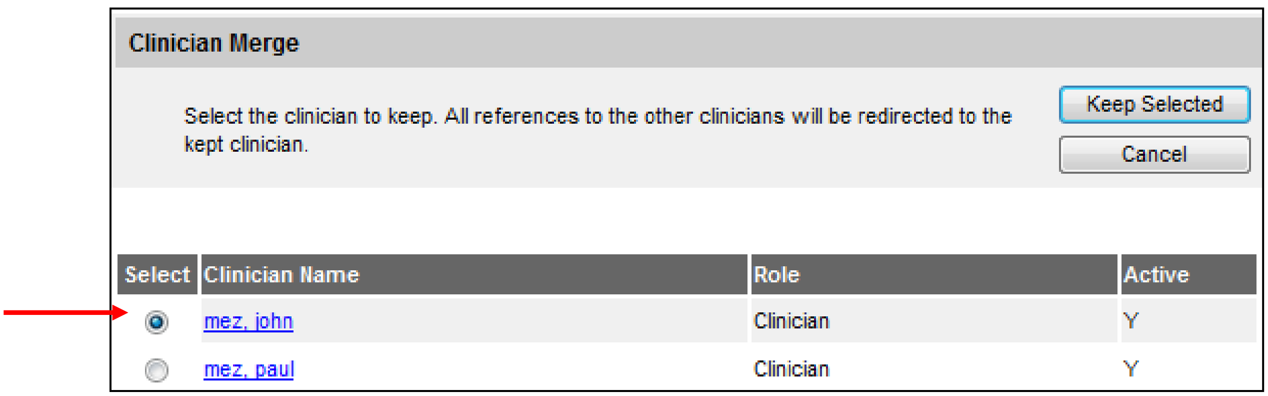
1. Click **Manage Clinicians** under Maintenance section of the menu panel.



2. Click the **Find Clinician** button.
3. Enter the last and/or first names of the clinician. Click the **Find** button.
4. Select at least two clinicians from the search results table and click the **Merge** button.

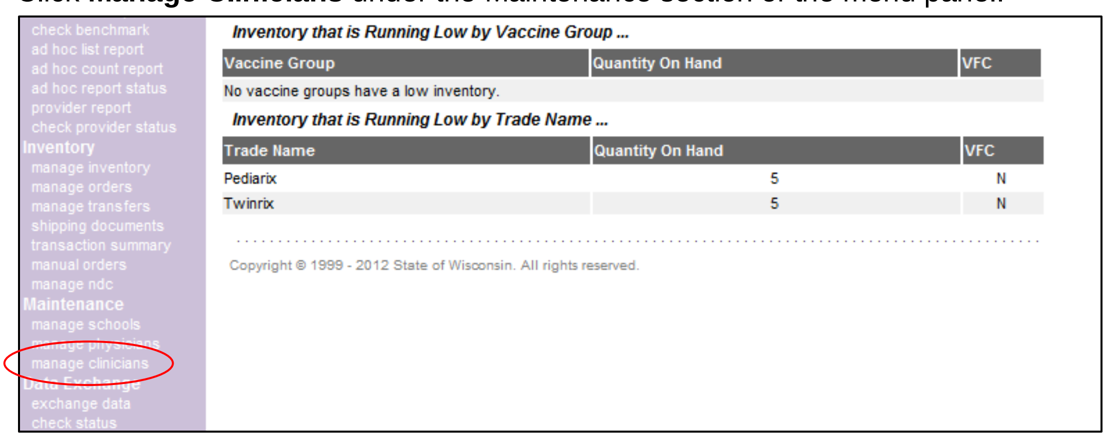


5. Select the Clinician you wish to keep and click the **Keep Selected** button.

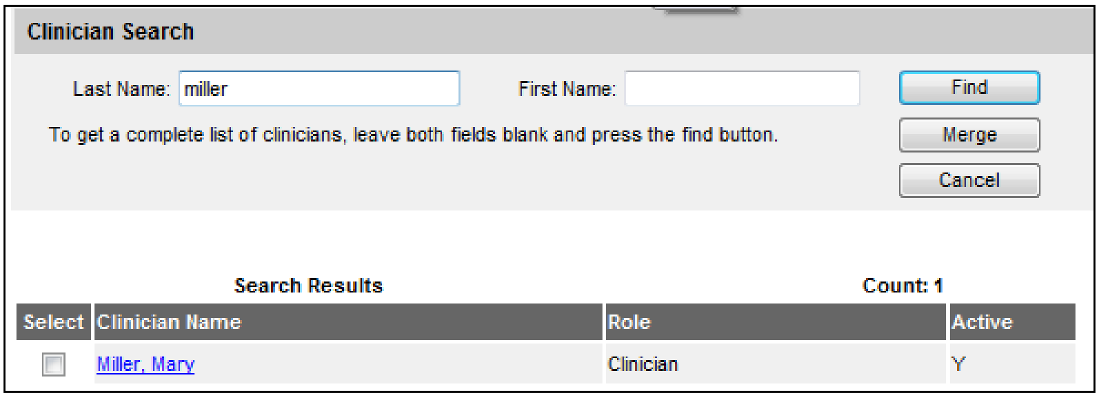


Deleting Clinicians

1. Click **Manage Clinicians** under the Maintenance section of the menu panel.

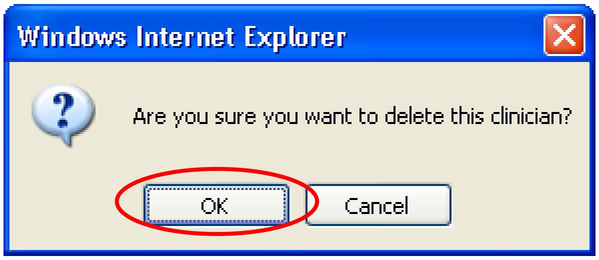


2. On the Manage Clinicians page click the **Find Clinicians** button or click the appropriate clinician name at the bottom of the Manage Clinicians screen. If you choose the latter option, skip to step 4.
3. At the Clinician Search screen, enter the first and/or last name of the clinician and click the **Find** button.
4. Then click the last name in the Search Results table or leave both fields blank and click the **Find** button to bring up a list of clinicians within the organization. Then click on the last name of the clinician within the Search Results table to bring up his or her information.



5. At the Edit Clinician Information page, click the **Delete** button

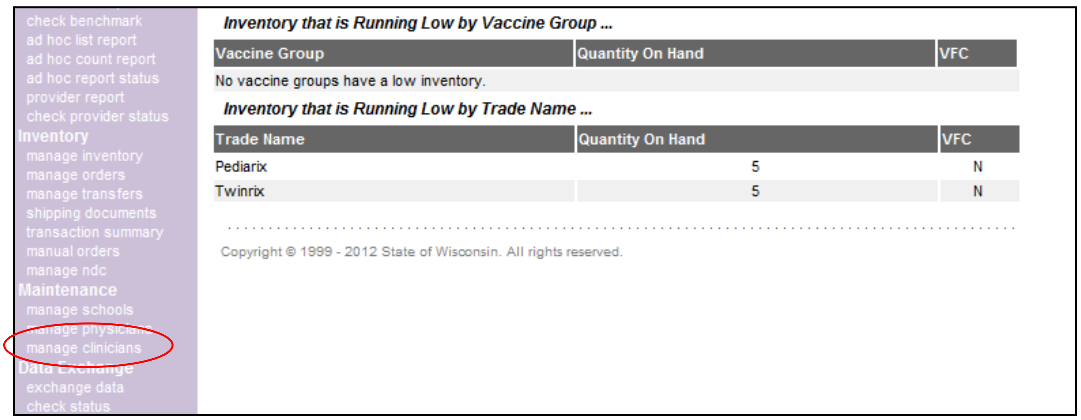
6. A box will open asking if you want to delete this clinician. Click the **OK** button.



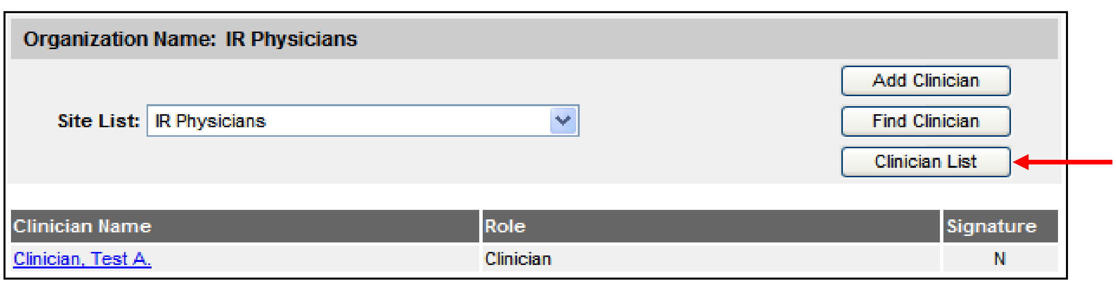
7. IRIS will return you to the Manage Clinicians page.

Listing All Clinicians

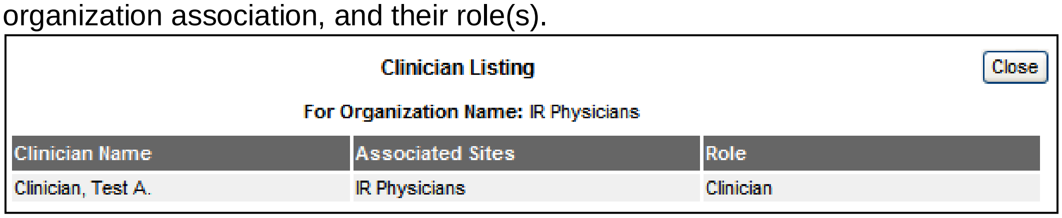
1. Click **Manage Clinicians** under the Maintenance section of the menu panel.



2. On the Manage Clinicians page, click the **Clinician List** button.



3. The Clinician Listing page will open showing all available clinicians, their organization association, and their role(s).



4. Click the **Close** button to return to the Manage Clinicians page.

Chapter 9
Managing Inventory

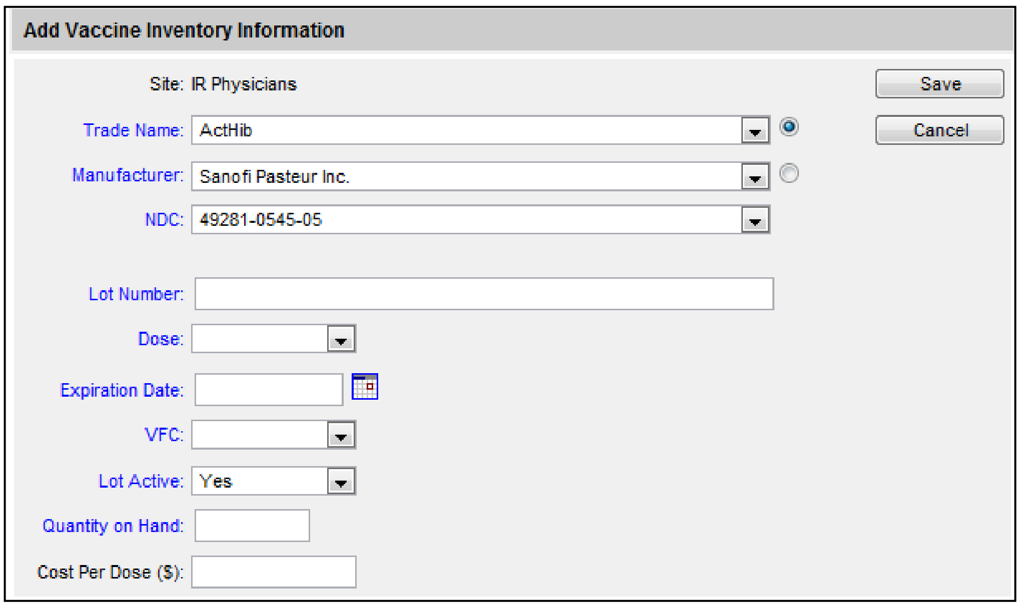
In this chapter:

The Inventory Module in IRIS is designed to be a complete tracking system for an organization's vaccine inventory. Standard and Admin users have the ability to set up the inventory module for their organizations and regularly view, add or update any vaccine in an organization's inventory.

Adding New Inventory

Use the Add Vaccine function only if you are setting up your inventory for the first time, or if you are adding a vaccine with a *new* lot number. If you are adding vaccine to a lot number that already exists in your inventory, refer to the *Updating Inventory* section in this chapter.

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. On the Manage Inventory page, click the **Show Inventory** button.
3. Click the **Add Inventory** button.
4. On the Add Vaccine Inventory Information page:



   a. Choose the vaccine's trade name or manufacturer from the drop down lists provided. Once you have selected a Trade Name or Manufacturer, the other field as well as the NDC drop down will be populated. Select the appropriate option.
   b. Enter the lot number of the vaccine in the Lot Number field.
   c. Choose the dose from the Dose Size drop down list; choose .1, .2, .25, .5, .65, 1, or 2 ml.
   d. Enter the vaccine lot's expiration date. Fill in the field using the MM/DD/YYYY format or use the calendar by clicking the calendar icon to the right of the field. Click the **OK** button. If no day is specified on the vaccine, enter the last day of the month.
   e. Choose **Yes** or **No** from the VFC drop down to specify if the lot is a VFC lot.

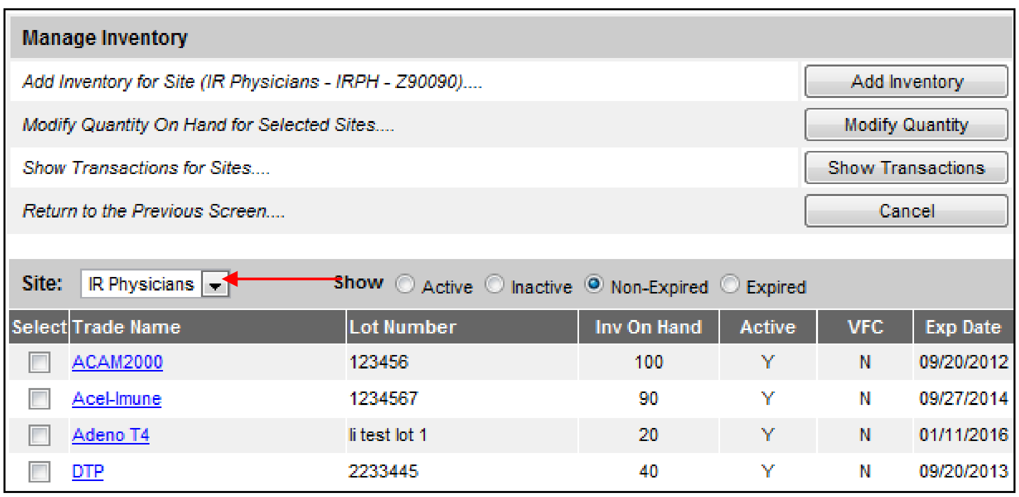
f. Choose **Yes** from the Lot Active drop down list. When adding new inventory the lot may only be entered as active. This controls whether the lot appears on the drop down list on the Add Immunization page.
g. Enter the number of vaccine doses received in the Quantity on Hand field.
h. Cost Per Dose is optional for clinic use: how much the clinic pays per vaccine.

5. Click the **Save** button.
6. If the new vaccine was saved successfully, the message “Inventory was inserted successfully” will appear at the bottom of the page.
7. To add additional vaccines, click the **Add New** button and repeat Steps 4-5.
8. To return to the Show Inventory page, click the **Cancel** button.

Viewing Inventory

To view your organization’s vaccine inventory in IRIS, follow these steps:

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Show Inventory** button.



3. The inventory table shown by default will include vaccines within your organization’s IRIS Inventory Module. If you have access to more than one organization, they will show up in the site drop down list.
4. Select one of the following options:
   a. **Active**: to view only those vaccine lots that have valid (non-expired) doses remaining in the inventory module (default).
   b. **Inactive**: to view only those vaccine lots that have been set to inactive by a user or automatically inactivated due to no doses remaining.
   c. **Non-Expired**: to view any active or inactive inventory that has not yet expired.
   d. **Expired**: to view any inventory that has expired.

Note: The red text in the View Inventory page indicates that a vaccine is inactive. A vaccine may be inactive for a number of reasons such as the inventory for that vaccine's lot number may have been decremented to zero, may have expired, or set to inactive by a user.

Vaccines on the View Inventory page that are highlighted in pink will expire within 30 days.

The following is an explanation of the columns in the inventory table:

Select: A mark in this checkbox allows you to modify the quantity of the selected vaccine.

Trade Name: This lists the vaccine's trade name.
Lot Number: This lists the lot number of the vaccine.
Inv On Hand: This lists the number of doses remaining in the organization's inventory.
Active: A "Y" indicates the inventory is active (available for use). An "N" indicates the vaccine is inactive (not available for use). Inactive vaccines are shown in red text.
VFC A "Y" indicates the inventory is a VFC lot.
A "N" indicates the inventory is a private lot.
Exp Date: This lists the vaccine's expiration date. Vaccines that will expire in 30 days or less are highlighted in pink.

Updating Inventory

There are two ways to change information on existing vaccines.

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Show Inventory** button.
3. The inventory table will display active vaccines by default.
4. Click the vaccine's trade name (which is a hyperlink) associated with the lot number you want to update.
5. On the next page, make desired changes to any of the fields.
6. Click the **Save** button. Changes made to a vaccine after a dose has been administered will be updated in a patient's record who has received a dose previously from that vaccine lot.

Alternatively:

To modify the quantity only of doses on hand select the checkbox under the Select column for the appropriate lot.

1. Click the **Modify Quantity** button located in the upper right hand corner of the page. Enter the following information:
2. Choose whether you would like to add or subtract from the inventory on hand from the Action drop down list.
3. Enter the quantity of inventory to be added or subtracted in the Amount field.
4. Choose an option from the Reason drop down list.
5. Click the **Save** button.
6. Once your updates are saved in IRIS, the message “Inventory was updated successfully” will appear at the bottom of the page.
7. Click the **Cancel** button to return to the Show Inventory/Manage Inventory page.

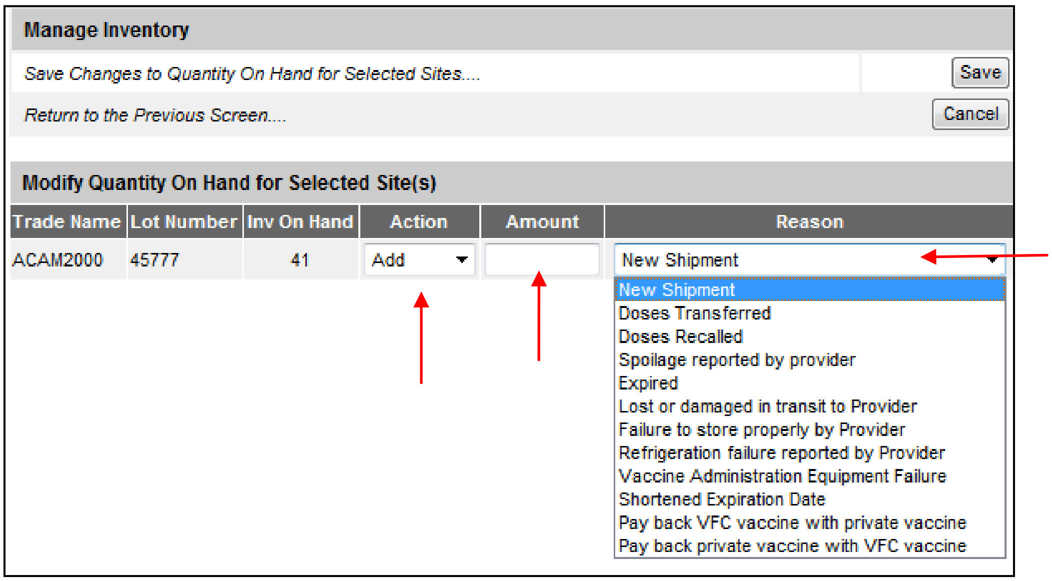


Table 1: Reasons for adding or subtracting inventory

New Shipment	When you are adding new inventory to a particular lot that already exists in your inventory
Doses Transferred	When subtracting inventory that has been transferred to another site associated with your organization
Spoilage reported by Provider	When subtracting inventory due to vaccines spoiling prior to expiration
Expired	When subtracting from inventory due to expiration
Lost or damaged in transit to Provider	When subtracting inventory due to broken vials
Failure to store properly by Provider	When subtracting inventory due to improper storage
Refrigeration failure reported by Provider	When subtracting inventory due to refrigeration malfunction
Doses Recalled	When subtracting inventory that has been recalled
Vaccine Administration Equipment Failure	When subtracting inventory due to equipment failure at time of administration
Shortened Expiration Date	When subtracting inventory due to a shortened expiration date
Payback VFC vaccine with private vaccine	When adding/subtracting inventory due to paying back VFC vaccine (that was administered to a non-eligible patient)
Payback private vaccine with VFC vaccine	When adding/subtracting inventory due to paying back private vaccine (that was administered to a VFC eligible patient)
Lost or unaccounted for in Provider inventory**	When subtracting inventory due to lost inventory
Error correction**	When adding to or subtracting from inventory doses that were incorrectly entered or when getting extra or fewer doses from a vial

***These adjustment reasons are only available to State users, and will not appear in the dropdown for standard users*

Modifying Quantities of Multiple Vaccines

To change inventory quantities of multiple vaccine lots:

1. Follow Steps 1-3 under the Updating Inventory section.
2. Check the box under the Select column next to the vaccine lots whose quantities you want to modify.
3. Click the **Modify Quantity** button.
4. On the Modify Quantity on Hand for Selected Site(s) page, enter the following information:

   a. Under Action, choose whether you would like to add to or subtract from the inventory on hand.
   b. Under Amount, enter the quantity of inventory to be added or subtracted.
   c. Choose an explanation for changing the quantity of the vaccine lot by selecting from the Reason drop down list. Refer to the list above for a description of the reasons for adding or subtracting inventory.
5. Click the **Save** button.

Inventory Alerts

Inventory alerts inform users of the status of their organization's vaccine inventory. These lists are displayed on the user's IRIS homepage. Alerts for vaccines that are going to expire and vaccines that are running low are initially generated by a system default setting. These alerts can be customized.

Inventory alerts can also be viewed on the Manage Inventory page. Select Manage Inventory located under the Inventory heading on the menu panel.

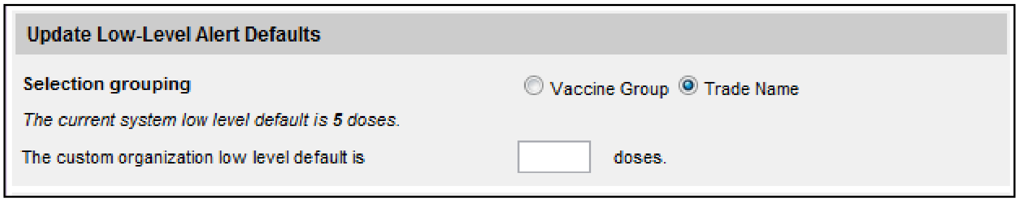
Each table under Inventory Alerts heading contains the following information:

- **Vaccine Order/Transfer Notification:** displays current orders/transfers along with their status.
- **Active Inventory that is Going to Expire or Expired Lots with a Quantity:** displays a list of vaccines that will expire within a set amount of days (30 days is the default) as well as vaccines that have expired but still have quantity in inventory.
- **Inventory that is running low by vaccine group**: displays inventory that is below a specific threshold of volume, list organized by vaccine group (the default low-level alert is 5 doses).
- **Inventory that is running low by trade name**: displays inventory that is below a specific threshold of volume, list organized by trade name (the default low-level alert is 5 doses).

Updating Inventory Alert Preferences

To update Inventory Alert Preferences for expiration and low inventory alerts:

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Update ALERT Prefs** button.
3. On the Inventory Expiration Alerts page, the system default is 30 days. To customize this alert enter the number of days you want to be notified prior to the expiration of any vaccine lot.
4. For all low-level alerts, the system default is 5 doses. Select the appropriate radio button for **Vaccine Group** or **Trade Name** in the Update Low-Level Alert Defaults section, and enter the number of doses you prefer.

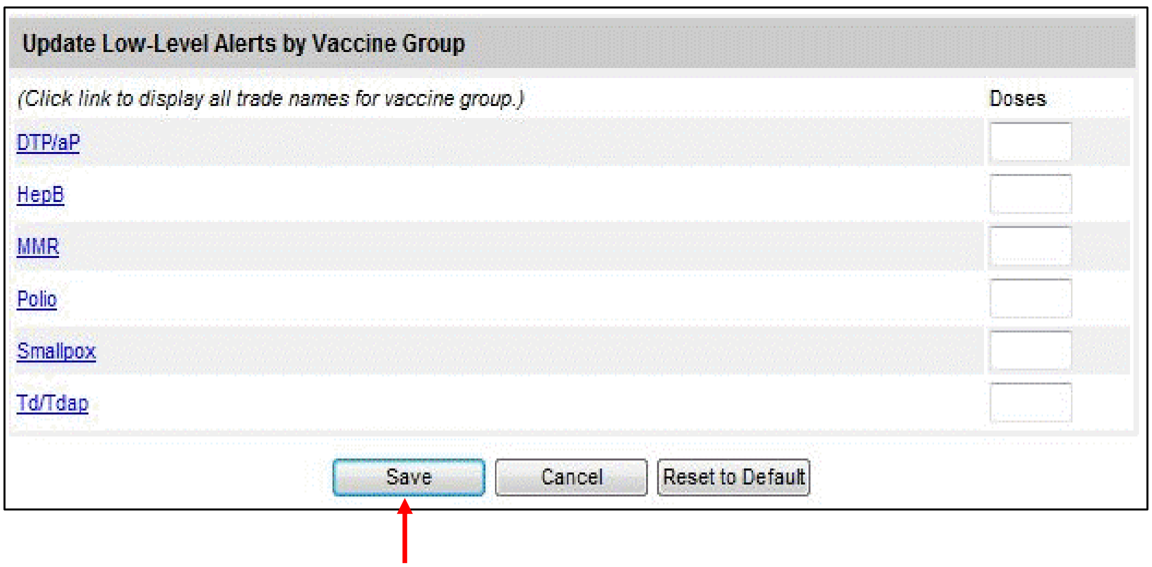


5. Click the **Save** button. If the new preferences were saved successfully, the message "Updated Alert Preferences" displays at the top of the page.

Vaccine Group

To customize low-level alerts for each individual vaccine group or trade name:

1. Under Update Low-Level Alerts by Vaccine Group, enter the number of doses that will indicate the inventory is running low for each vaccine group listed.
2. Click the **Save** button.



Trade Name

1. Under Update Low-Level Alerts by Vaccine Group, click the underlined vaccine group to display the trade names.
2. Enter the number of doses that will indicate the inventory is running low for the trade names listed.
3. Click the **Save** button.

Note: To restore all inventory alerts to IRIS system defaults, click the Restore Defaults button. Click the OK button. To return to the Manage Inventory page, click the Cancel button.

Printing Inventory

To print a list of inventory:

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Show Inventory** button.
3. Click anywhere on the page.
4. Print according to your system's requirements, which could include:
    a. Click **File** and click **Print**.
    b. Click the Printer icon in the browser's toolbar.
    c. Simultaneously press **CTRL+P** on the keyboard.
5. If your printout is cut off, try setting your printer to print in landscape.

Viewing Inventory Transactions

The Show Transactions page is used to display vaccine lot track records for all inventory quantity-changing events. To run an inventory transaction report:

1. Click **Manage Inventory** under the Inventory section of the menu panel.
2. Click the **Show Transactions** button.
3. Enter the "From" and "To" dates for when the immunizations were entered in or submitted to IRIS.
4. Alternatively, enter the "From" and "To" dates for when the immunizations were administered to the patient(s).
5. Choose a specific user name or All User Names.
6. Choose a specific transaction type or All Transaction Types. These transactions relate to the Reason drop down list on the Edit Vaccine Inventory Information page.
7. Select the inventory site whose transactions you wish to view or choose All Sites with Inventory.
8. Choose a specific trade name, lot number, and site or choose All Lot Numbers.
9. Enter the quantity of records you wish to view in the Display Last <#> Records field.
10. Click the **View** button. The Vaccine Transactions page displays.

Export Transactions as CSV | Export Totals as CSV

Vaccine Transactions for Organization: IR Physicians - IRPH - Z90090						Record Count: 7	
Trans Date	**Lot \ Trade Name**	**VFC**	**Type**	**Qty**	**Patient Name**	**Vaccine Eligibilty**	**DOB**
01/19/2012	LUIS TEST \ Fluzone Pres-Free	No	Immunize	-1	CHAVEZ, LUIS	N	01/01/2010
02/03/2012	LI \ Adeno T7	Yes	Immunize	-1	WELLS, TEST	M	08/02/2008
02/08/2012	luis \ Adeno T7	No	Immunize	-1	CHAVEZ, LUIS		01/01/2010
02/08/2012	luis \ Adeno T7	No	Delete	1	CHAVEZ, LUIS		01/01/2010
02/08/2012	LI \ Adeno T7	Yes	Immunize	-1	CHAVEZ, LUIS		01/01/2010
02/08/2012	LI \ Adeno T7	Yes	Delete	1	CHAVEZ, LUIS		01/01/2010
02/08/2012	LI \ Adeno T7	Yes	Immunize	-1	CHAVEZ, LUIS	M	01/01/2010

Vaccine Transactions Totals			
Trans Code	**Trans Description**	**Trans Count**	**Trans Value**
REC	New Shipment	0	0
Immunize	Immunizations Given	5	-5
Delete	Immunizations Deleted	2	2
TRA	Doses Transferred	0	0
3	Spoilage reported by provider	0	0
4	Expired	0	0
5	Lost or damaged in transit to Provider	0	0
6	Failure to store properly upon receipt by Provider	0	0
7	Refrigeration failure reported by Provider	0	0
11	Lost or unaccounted for in Provider inventory	0	0
12	Other - Not Usable, reported by Provider	0	0
13	Vaccine Administration Equipment Failure	0	0
14	Shortened Expiration Date	0	0
15	Pay back VFC vaccine with private vaccine	0	0
16	Pay back private vaccine with VFC vaccine	0	0
RECALL	Doses Recalled	0	0
ADMIN	Doses Administered	0	0
RET	Doses Returned	0	0
ERR	Error Correction	0	0
RECON	Doses Reconstituted	0	0
	Transaction Totals:	**7**	**-3**

Table 2: Vaccine Transactions

The top chart on the Vaccine Transactions page gives the following information:

Site Name	Vaccines in the table are first sorted alphabetically by your site name.
Trans Date	Vaccines are next sorted numerically by transaction date; the most recent transactions are shown first.
Lot/Trade Name	The lot number and trade name of the vaccine are listed in this column.
VFC	Indicates if the vaccine lot is a VFC lot (Yes) or a Private lot (No)
Type	Refer to Table 2 in this chapter for an explanation of the transaction codes shown in this column.
Qty	The quantity added to or subtracted from inventory due to the listed transaction type.
Patient Name	The patient associated with the transaction, if applicable.
Vaccine Eligibility	Displays the vaccine eligibility of the patient/transaction (if applicable)
DOB	The date of birth of the patient, if applicable.

Table 3: Transaction Totals

The chart at the bottom of the Vaccine Transactions page gives a breakdown of transactions by transaction type.

Trans Code	Abbreviated code that identifies the transaction type.
Trans Description	Full transaction type.
Trans Count	Number of times a particular transaction type was performed within the dates you specified.
Trans Value	Quantity of doses added or subtracted by transaction type.

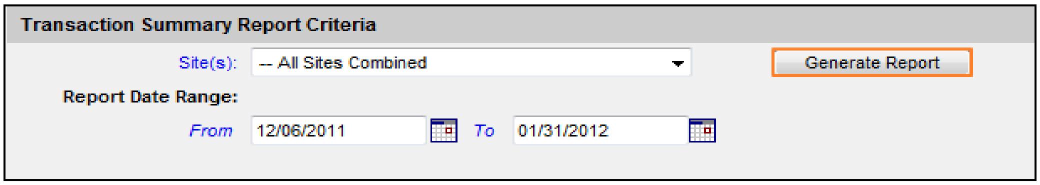
Printing Inventory Transactions

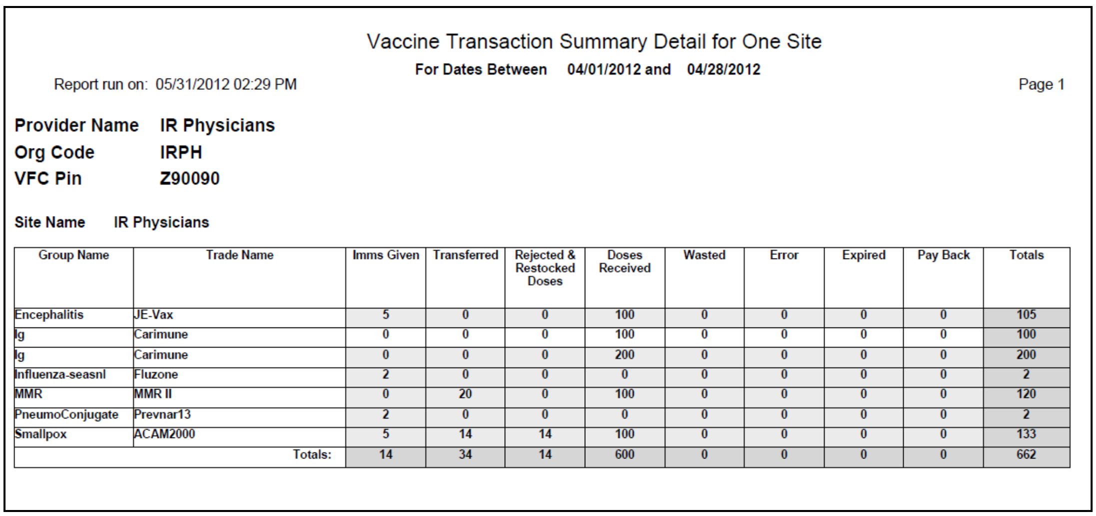
To print a list of vaccine transactions:

1. Click anywhere on the View transactions page, per above.
2. Print the page according to your system's print settings.
3. Two (2) export buttons are available on the Show Transactions page; one to export the Transactions, and one to export the Totals. Both will populate an excel worksheet and can be printed from the Excel application.

Printing Vaccine Summary Report

1. Click **Transaction Summary** underneath “Inventory” from the menu panel.
2. Select the Site from the dropdown (or all sites combined is the default).
3. Enter a From date and To date, or use the calendar icons to select the desired dates.
4. Click Generate Report button.





Vaccine Transaction Summary Detail for One Site

For Dates Between 04/01/2012 and 04/28/2012

Report run on: 05/31/2012 02:29 PM

Page 1

Provider Name **IR Physicians**
Org Code **IRPH**
VFC Pin **Z90090**

Site Name **IR Physicians**

Group Name	Trade Name	Imms Given	Transferred	Rejected & Restocked Doses	Doses Received	Wasted	Error	Expired	Pay Back	Totals
Encephalitis	JE-Vax	5	0	0	100	0	0	0	0	105
Ig	Carimune	0	0	0	100	0	0	0	0	100
Ig	Carimune	0	0	0	200	0	0	0	0	200
Influenza-seasnl	Fluzone	2	0	0	0	0	0	0	0	2
MMR	MMR II	0	20	0	100	0	0	0	0	120
PneumoConjugate	Prevnar13	2	0	0	0	0	0	0	0	2
Smallpox	ACAM2000	5	14	14	100	0	0	0	0	133
	Totals:	14	34	14	600	0	0	0	0	662

Table 4: Transaction Types

Imms Given	Indicates vaccines were automatically subtracted from inventory because of Immunizations Given
Transferred	This type indicates vaccines were subtracted due to Transfer
Rejected and Restocked Doses	Indicates vaccines were subtracted from inventory due to being Returned
Doses Received	Indicates vaccines were added to inventory due to New Shipment
Wasted	Indicates vaccines were subtracted for one of the following reasons: Spoilage Reported by Provider Lost or damaged in transit to Provider Failure to store properly by Provider Refrigeration Failure reported by Provider

	Lost or unaccounted for in Provider inventory - IDPH only Doses Recalled Vaccine administration equipment failure
Error	Indicates vaccines were added/subtracted due to Error correction - IDPH only
Expired	Indicates vaccines were subtracted due to expiration date, or automatically when report runs due to shortened expiration date
Payback	Indicates vaccines were added/subtracted due to: Payback VFC vaccine with private vaccine Payback private vaccine with VFC vaccine

Note: Transaction Summary does not include deleted items from inventory.

Doses Administered Report

The Doses Administered Report will give you information on how many doses of each vaccine have been given, by age, within a specified date range. This report includes administered immunization records from IRIS Inventory (historical immunizations are not included). In the next release, this report will be modified to display all doses administered, not just doses from inventory. Follow these steps to generate a Doses Administered report for your organization:

1. Click the **Doses Administered** menu item under the Inventory section of the menu panel.
2. At the Doses Administered Report Criteria page, choose your organization from the Site drop down list.
3. In the “From” field under Report Date Range, choose a starting and ending date for your report using the MM/DD/YYYY format.
4. Click the **Generate Report** button.
5. The report displays in Adobe Acrobat Reader®. Print according to your system specifications.
6. Click your browser’s Back button to return to the Doses Administered Report criteria.

Viewing Vaccine Orders

The Manage Orders page displays vaccine orders, the date they were submitted, and their status. Orders are categorized as Current, Historical or Both. To view the Manage Orders page click Manage Orders under the Inventory section of the menu panel.

Current Orders

By selecting the **Current** radio button, you will be able to view all new and processed orders that have not been accepted or rejected.

These orders will show a status of one of the following:

- **Pending:** Order has been created and submitted; however, the Vaccines for Children program has not yet opened the order. You may still modify the order.
- **In Progress:** Order is being filled by Vaccines for Children program; you may no longer modify the order through IRIS. If you need to alter an order at this stage, call the VFC Program at 1-800-831-6293
- **Sent to Distributor:** Order has been fully processed by the Vaccines for Children program and will be forwarded on to the appropriate order fulfillment facility.
- **Cancelled:** Order has been cancelled.
- **Shipped:** Order has been shipped.

Historical Orders

By selecting the **Historical** radio button, you will be able to view all complete orders from the last 30 days. You may also enter a date range to view other completed orders. Historical orders will show a status of one of the following:

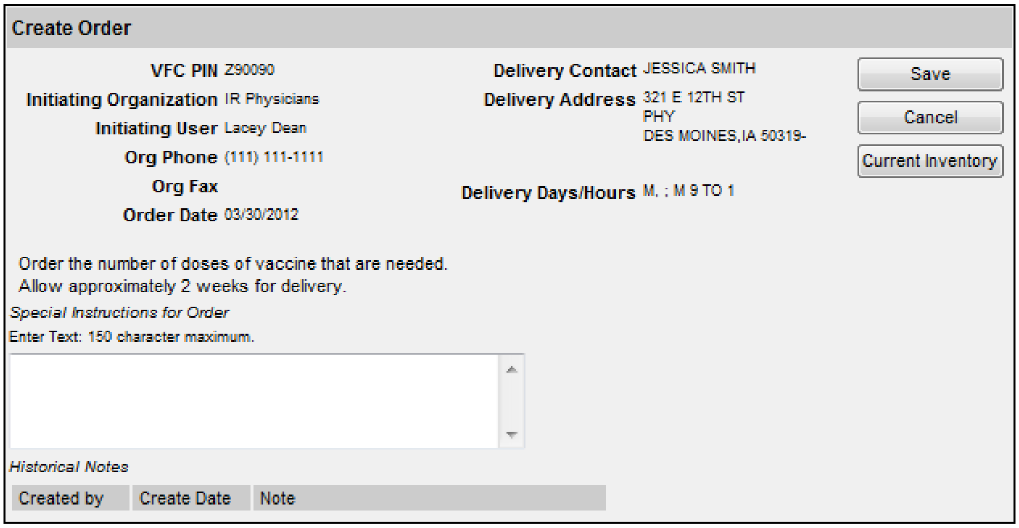
- **Cancelled:** Order was cancelled.
- **Denied:** Entire order was denied by the Vaccines for Children program.
- **Accepted:** Partial or entire order was accepted by the receiving organization.
- **Rejected:** Partial or entire order was completely rejected by the receiving organization and then restocked, if applicable, by the Vaccines for Children program.

Ordering Vaccines

If you are a Vaccines for Children (VFC) provider, you may order vaccines once your organization has been trained and approved to order through IRIS. In 2013, IRIS will have an interface with organizations shipping state supplied vaccine; at that point, once an organization has accepted a vaccine shipment, IRIS will automatically post the shipment to the organization's inventory. Until this interface is in place, **organizations will need to manually input received shipments of vaccine into the inventory module.**

To create a vaccine order in IRIS:

1. Click **Manage Orders** under the Inventory section of the menu panel.
2. Click the **Create Order** button.



3. Enter the number of doses you wish to order of the desired vaccine(s) listed in the Orderable Vaccines section. The Orderable Vaccines section displays the information described in the table below.

Table 5: Orderable Vaccine columns

Column Name	Description
Vaccine Group	Displays Vaccine Group that can be ordered.
Trade Name	Displays Trade Names that can be ordered.
Packaging	Displays the packaging description that is associated with the NDC number.
NDC Number	Displays the NDC number for the vaccine being ordered.
Doses on Hand	Displays the total inventory on hand in IRIS for the NDC.
Doses Admin (EOQ) EOQ: Economic Order Quantity	Displays the number of doses that have been administered during the same EOQ ordering time frame from the previous year.
Recommended Order Quantity	Displays the difference between Doses Admin EOQ and Doses on Hand (rounded up to the nearest package size).
Doses Ordered	User will enter the requested number of doses.

Organizations who manage inventory in IRIS

Orderable Vaccines

Vaccine Group	Trade Name	Packaging	NDC Number	Doses Admin (EOQ)	Doses on Hand	Recommended Order Qty	Doses Ordered
BCG	BCG-TB	10 pack - 1 dose vials test	55555-8888-11	0	50	0	
CHOL	Cholera-I	CHOLERA VACCINE USP 105 ML VIAL	46331-*280-11	0	0	0	
DTAP	Adacel	TDAP 1 DOSE SYRINGE	49281-0400-15	0	120	0	
DTAP	Adacel	TDAP BOOSTER FOR ADOLESCENTS	49281-0400-10	1	77	0	
DTAP	Boostrix	TDAP BOOSTER FOR ADOLESCENTS	58160-0842-11	0	0	0	
DTAP	Boostrix	TDAP BOOSTER SYRINGES NO NEEDLES	58160-0842-46	1	5	0	
DTAP	DAPTACEL	DAPTACEL 10X1 DOSE VIAL	49281-0286-10	9	367	0	
DTAP	DAPTACEL	Daptacel 10 X 1	33333-3333-22	0	0	0	
DTAP	DECAVAC	10-PACK 1-DOSE VIALS	49281-0291-83	2	20	0	
DTAP	DECAVAC	10X1 DOSE SYR-PEDS	49281-0291-10	5	15	0	
DTAP	DT	DIPHTHERIA AND TETANUS TOXOIDS ADSORBED 5 ML VIAL	49281-*275-10	0	0	0	

Organizations who do *not* manage their inventory in IRIS

Orderable Vaccines					
Vaccine Group	Trade Name	Packaging	NDC Number	Doses on Hand	Doses Ordered
BCG	BCG-TB	10 pack - 1 dose vials test	55555-8888-11		
CHOL	Cholera-I	CHOLERA VACCINE USP 105 ML VIAL	46331-*280-11		
DTAP	Adacel	TDAP 1 DOSE SYRINGE	49281-0400-15		
DTAP	Adacel	TDAP BOOSTER FOR ADOLESCENTS	49281-0400-10		
DTAP	Boostrix	TDAP BOOSTER FOR ADOLESCENTS	58160-0842-11		
DTAP	Boostrix	TDAP BOOSTER SYRINGES NO NEEDLES	58160-0842-46		
DTAP	DAPTACEL	Daptacel 10 X 1	33333-3333-22		
DTAP	DAPTACEL	DAPTACEL 10X1 DOSE VIAL	49281-0286-10		
DTAP	DECAVAC	10-PACK 1-DOSE VIALS	49281-0291-83		
DTAP	DECAVAC	10X1 DOSE SYR-PEDS	49281-0291-10		
DTAP	DT	DIPHTHERIA AND TETANUS TOXOIDS ADSORBED 5 ML VIAL	14362-0113-*5		
DTAP	DT	DIPHTHERIA AND TETANUS TOXOIDS ADSORBED 5 ML VIAL	49281-*275-10		

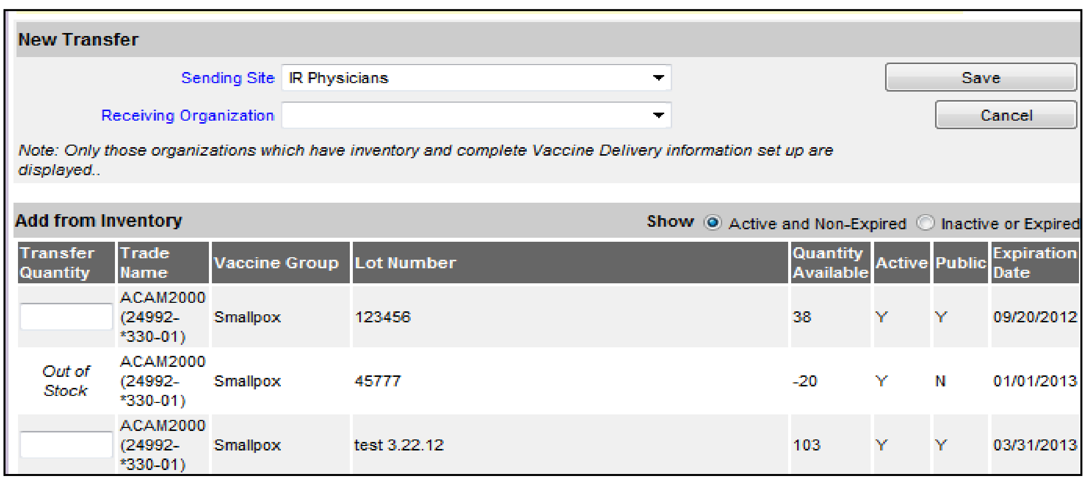
4. If you belong to an organization who does not manage their inventory in IRIS you will also be required to enter your Doses on Hand for each vaccine you wish to order.
5. Once you are finished click the Save button.
6. Once your order is submitted you will be returned to the Manage Orders screen and the order will be listed in a PENDING status. You may still add or remove vaccines to the order in this status by clicking on the PENDING link.
7. From the Manage Order page, you can track the status of your order. Pending orders can be modified or cancelled by clicking the “Pending” hyperlink on the Manage Order page.

Creating Transfers

IRIS allows you to transfer vaccines between sites within your organization or between two organizations. To create a transfer:

1. Click **Manage Transfers** under the Inventory section of the menu panel.

2. Click the **New Transfer** button.
3. Enter the following information:
    a. Sending Site from which you will be taking the vaccine from.
    b. The receiving organization which you are transferring the vaccine to.
    c. Choose between active/non-expired or inactive/expired vaccines by clicking the appropriate radio button.
    d. Number of doses in the Transfer Quantity field for each of the trade names being transferred.
4. Click the **Save** button.
5. “Saved Successfully” will confirm your transfer transaction.
6. Click the **Packing List** button or the Label button.
7. Click the **Ship** button when ready to ship the vaccines. Either use today’s date or enter an alternate date in MM/DD/YYYY format.
8. Click the **Ship** button. “Transfer Successfully Shipped” displays. The transfer will then be moved to the Outbound Transfer list, where it will remain until it is accepted by the receiving site/organization.
9. To complete an internal transfer without printing shipping documents, click the **Finish Trans** button. The ship and receive dates will be set to the current date. The inventory affected by the transfer will be directly added to the internal receiving site’s inventory and deducted from the sending site’s inventory.



New Transfer

Sending Site: IR Physicians — Save

Receiving Organization: — Cancel

Note: Only those organizations which have inventory and complete Vaccine Delivery information set up are displayed..

Add from Inventory — Show: Active and Non-Expired / Inactive or Expired

Transfer Quantity	Trade Name	Vaccine Group	Lot Number	Quantity Available	Active	Public	Expiration Date
	ACAM2000 (24992-*330-01)	Smallpox	123456	38	Y	Y	09/20/2012
Out of Stock	ACAM2000 (24992-*330-01)	Smallpox	45777	-20	Y	N	01/01/2013
	ACAM2000 (24992-*330-01)	Smallpox	test 3.22.12	103	Y	Y	03/31/2013

Note: Only organizations that have a valid vaccine delivery address and have designated a contact with the ‘Vaccine Delivery’ role will be listed under ‘Receiving Organizations’.

Shipping Documents

If your organization sent a transfer, you can view and print the packing list and shipping labels associated with the transfer. The packing list and label can be generated immediately after a transfer has been created (see Creating Transfers in this chapter), or by using the following feature:

1. Click **Shipping Documents** under the Inventory section of the menu panel.
2. Click the **Packing List** button or the Label button. Print labels and/or packing list, if desired.
3. Enter a ship date if different from today's date, using MM/DD/YYYY format.
4. Click the **Ship** button. "Transfer Successfully Shipped" displays in the upper right of the Manage Transfer page.

Accepting or Rejecting Transfers

Transfers made through IRIS and received by the provider organization must be accepted, rejected or partially accepted so that IRIS can post and track inventory properly. To accept or reject a transfer:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. The Manage Transfer page categorizes transfers as follows:
   a. Outbound Transfer: Displays transfers that are outbound from your organization
   b. Inbound Transfer: Displays transfers that are inbound to your organization
   c. Historic Transfer: Displays completed transfers
3. To proceed to the Receive Transfers page (on which you may accept or reject transfers), locate the Inbound Transfer section and click the date (which is a hyperlink) in the Create Date column.
4. Ensure that the corresponding Type column states Transfer. At the Receive Transfer page, you may accept the entire transfer, reject the entire transfer, or partially accept some of the transfer, while rejecting the remainder.

Accept Transfer

1. Click the **Accept Transfer** button to accept the transfer and add all transfer items into inventory.
2. Click the **OK** button to continue with the acceptance and be returned to the Manage Transfers page.

Reject Transfer

1. Click the **Reject Transfer** button to reject the entire transfer.
2. Select a reason in the Enter Rejection Reason drop-down list:
    a. Damaged, Not Wanted, Wrong Vaccine or Never Received.
3. After selecting a reason, click the **Reject** button.
4. Click the **OK** button to continue with the rejection and be returned to the Manage Transfers page.

Partially Accept

1. Click the **Partially Accept** button.
2. At the Partially Accept Transfer page, select the dose quantity of the each vaccine you wish to accept and a rejection reason for those you wish to reject.
3. Click the **Save** button.
4. Click the **OK** button to continue with partially accepting the transfer and be returned to the Manage Transfer page.

Shipping and Restocking Transfers

When a transfer has been rejected with a reason code of Not Wanted, Wrong Vaccine, Never Received, or Damaged it is necessary to ship and restock the transfer in the system so that the doses are correctly reported in inventory.

Shipping Back a Rejected Transfer

If you are the receiving site of a transfer or order that you reject, you must ship the rejected quantities back to the original sender. To ship the rejected quantities back to the original sender:

1. Click **Manage Transfers** under the Inventory section of the menu panel.
2. Click the appropriate transfer date (which is a hyperlink) under the Create Date column.
3. Enter a return ship date at the Ship Return Transfer page by entering the date in MM/DD/YYYY format.
4. Click the **Ship** button.

Accepting a Rejected Transfer

If you are the original sender of a transfer, and the receiving organization has rejected the shipment and shipped it back to you, you will need to restock the rejected quantities in the system. To do this, follow these steps:

1. Click **Manage Transfers** under the Inventory section of the menu panel.

2. Click the transfer date of the rejected transfer (which is a hyperlink) under the Create Date column.
3. Click the **Save** button at the Restock Rejected Transfer page. The Manage Transfer page will display, and the transfer will be added to the Historical section of the page.

Chapter 10
Managing Patients

In this chapter:

IRIS receives immunization information from multiple provider sources, including birth record downloads. Always attempt to find a patient in IRIS before entering them as a new patient. IRIS will attempt to deduplicate patient records (i.e., compare entered information against information saved to the system for duplicate patients) prior to saving the information on the Enter New Patient page.

Finding Patients

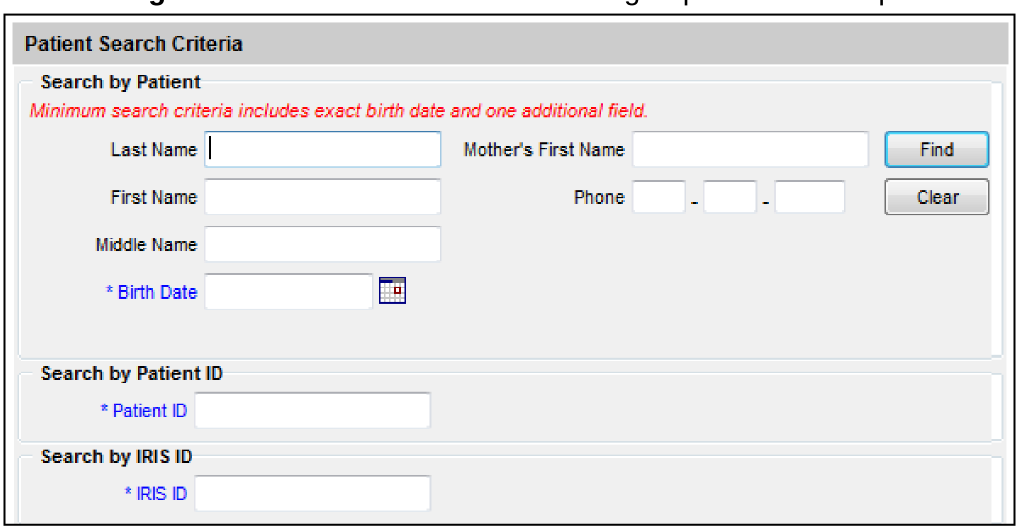
Searching for a patient in IRIS before entering them as new patient will prevent duplicate records from being entered into the system. There are many different combinations of search criteria that can be used to locate patients in IRIS. Remember when searching for patients, you are searching on a statewide level and not just within your organization therefore, more information is not always better. Entering too much information about a patient will decrease the odds of locating the patient in the database. To review recommended search criteria examples, please see the Examples of IRIS Search Criteria section in this chapter.

Manage Patient vs. Manage Immunizations

Manage Patient and Manage Immunizations are the same query; in other words, they both utilize the patient search function. The difference is that the Manage Patient query will display the Demographic page, while the Manage Immunizations query will display the patient's Immunization History page.

To search for a patient in IRIS:

1. Click **Manage Patient** under the Patients menu group on the menu panel.


Patient Search Criteria
Search by Patient
Minimum search criteria includes exact birth date and one additional field.
Last Name
Mother's First Name
Find
First Name
Phone
Clear
Middle Name
* Birth Date
Search by Patient ID
* Patient ID
Search by IRIS ID
* IRIS ID

2. In the Patient Search Criteria box, you have several options for finding the patient. It is important to note that if you are searching by patient information (not patient ID). The minimum search criterion includes exact birth date and one additional field.
   a. **Birth Date:** Birth date is a required field. Entering the patient's birth date in conjunction with his or her first and/or last name will narrow a search for a common name.
   b. **Last Name:** Entering the first two letters of the patient's last name, along with the birth date, will initiate a search of all patients matching those letters and birth date. The last name requires two or more characters. Remember patients may go by more than one last name, so vary your search options.
   c. **First Name:** Entering the first two letters of the patient's first name, along with the birth date, will initiate a search of all patients matching those letters and birth date. Entering a single letter along with birth date will return only patients with a single-letter first name.

Entering Names

On all first and last names entered for patient searches, IRIS disregards spaces, apostrophes, and hyphens entered.

   d. **Middle Name:** Entering the first two letters of the patient's middle name along with the birth date will initiate a search of all patients matching those letters and birth date. Entering a single letter along with birth date will return only patients with a single-letter middle name.
   e. **Mother's First Name:** Entering the first two letters of the mother's first name along with the birth date will initiate a search of all patients matching those letters and birth date. Entering a single letter along with birth date will return only patients whose mother has a single-letter first name.
   f. **Phone:** Entering the patient's main 7-digit phone number (area code not required) and birth date will identify patients with the exact phone number. This method is not recommended as a phone number may not be entered and may change over time.
3. Click the **Find** button.
4. If multiple records are found matching the criteria you entered, a table listing up to 75 possible matches with detailed information on each patient displays. To choose a patient from this list, click the patient's last name (which is a hyperlink).

Possible Matches: 2

Last Name	First Name	Middle Name	Birth Date	Primary Patient Identifier	Mother's First	Gender	Status
MOUSE	MICKEY	JOSEPH	01/01/2010	DY-123	SARA	M	A
AKA:	MOUSE,M J						
MOUSE	MINNIE	JUNE	01/01/2010		FRANNY	F	A

5. If only one patient matches your search, IRIS displays that patient's demographic page.
6. If no patients match your search, review the search criteria information you entered for accuracy. If you suspect the patient has not been entered into IRIS, proceed to Entering a New Patient later in this chapter.
7. If multiple records are found matching the criteria you entered and there are over 75 matches, IRIS displays a warning that there are too many patients matching your search criteria. In this situation, refine your search criteria to limit your patient list.

Finding Patients with No First Name

- Search using only the last name and birth date. This will return patients matching those letters and birth date, including patients with or without a first name.
- Alternatively, search using the last name and birth date, and enter "No First Name" in the first name field. This will narrow the search results to patients with no first name.

Searching by Patient ID

A patient may have numerous Patient IDs; each ID is organization dependent. Entering the Patient ID will produce a single name match. To find a patient using this method the Patient ID must have been entered previously in the patient record in IRIS and the birth date is not required. When searching with Patient ID, all other entered information is ignored.

Examples of IRIS Search Criteria

A minimum search criteria includes exact birth date and one additional field.

Patient DOB and any combination of the following:

- Last Name
- First Name
- Middle Name
- Mother's First Name
- Phone Number
- Patient ID
- IRIS ID

Using Drop-Down Lists in IRIS

When entering information on new patients or editing patient information, you will use drop-down lists—fields that contain a list of options from which you may choose—rather than text fields for certain input data. The advantages of drop-down lists over text fields include:

- Ease of use. Allows users to quickly fill in a data field without typing in the information.

- Health Level 7 (HL7) compliance. HL7 is a method of categorizing data so that it is uniform across all health reporting systems. This standardization allows providers using different systems to transfer data easily. With predefined drop-down lists, IRIS stays in HL7 compliance.
- Uniformity of entered data. By choosing information from a drop-down list, users do not risk entering conflicting information that could decrease the accuracy of IRIS reports.
- Confidentiality. By using standard drop-down lists, IRIS avoids confidentiality issues associated with the typing of free text.

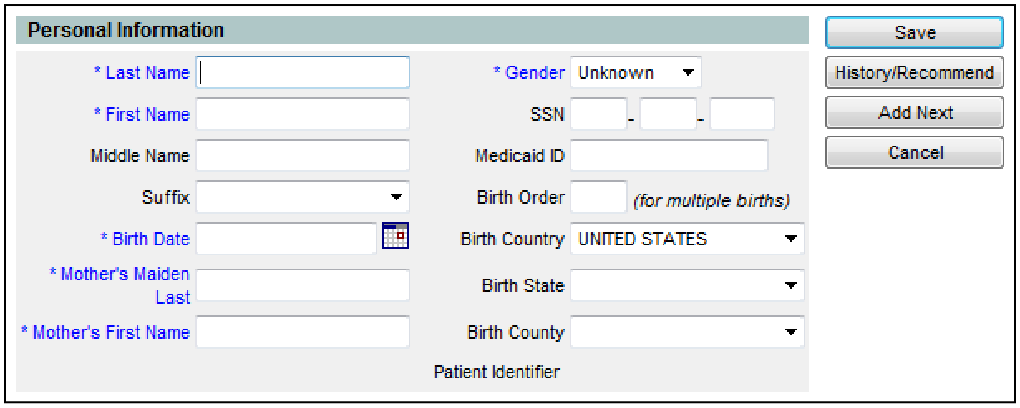
Editing/Entering Patient Information

The Update Patient demographic page allows you to update or change specific, non-immunization information relating to any patient in IRIS. The Enter New Patient page, accessed by clicking this option on the menu panel, allows you to input information for a new patient. The Update Patient and Enter New Patient pages are divided into the following sections: Personal Information, Patient AKA, Organization Information, Patient Information, Address Information, Responsible Persons, Patient Comments, and Patient Notes. Except for required demographic information, all other information in these fields is optional. Each of these fields is explained in detail below.

Note: Organizations participating in a pandemic exercise or event will utilize the CRA Event Information section located directly beneath the Patient Information section of the Demographic page. The CRA Event Information section will not be displayed when an organization is not participating in an exercise or event.

Personal Information Section

The Personal Information Section at the top of the Demographic and Enter New Patient pages contains patient-specific information used primarily to identify patients when conducting patient searches. All fields shown in blue font are required with the exception of Mother's Maiden Last name and Mother's First Name, which are highly recommended for patient matching. Refer to Appendix 2 of this manual for information on allowable entry characters and names for these fields.



- **Last Name:** required field
- **First name:** required field
- **Middle name:** optional field
- **Suffix:** optional field.
- **Birth Date:** required field
  - Complete the field using the MM/DD/YYYY format or use the calendar by clicking the calendar icon to the right of the field, clicking the appropriate date, and then clicking the OK button.
  - Children entered by the Vital Records program do not have editable birth dates. The parent/guardian must contact the IRIS Help Desk at 1-800-374-3958 in the event a birth date is in dispute.
- **Mother's Maiden Last Name:** This is a highly recommended field.
  - IRIS will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication of patients. Once entered, it will be kept confidential and the field will display *(On File)*.
- **Mother's First Name:** highly recommended field
  - IRIS will allow you to save the record without this field completed; however, it will request you gather this information for future deduplication of patients.

Note: It is critical that the information in the Mother's Maiden Last Name and Mother's First Name fields is accurate. **If you do not have the correct information leave these fields blank. Do not use a fake name, foster mother, or type "unknown" in the fields.**

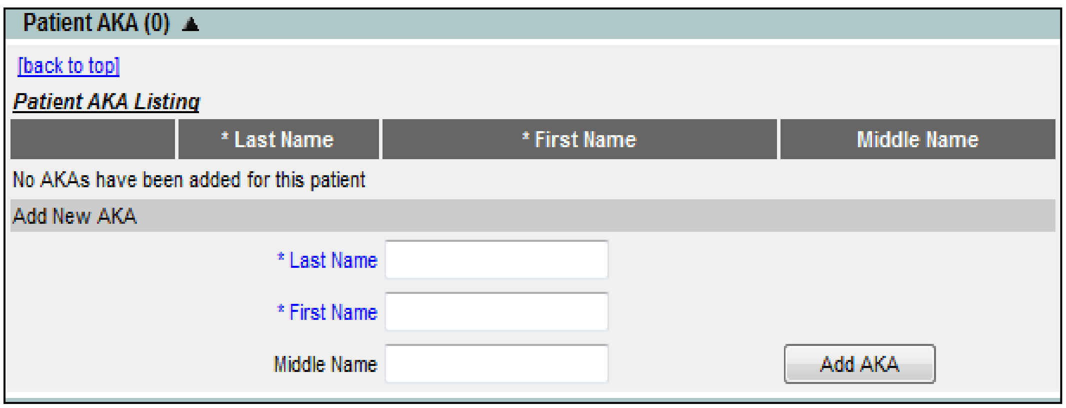
- **Gender:** optional field
  - This field defaults to male.
- **SSN:** optional field
  - Once entered, the Social Security Number will be kept confidential and the field will display *(On File)*.
- **Medicaid ID:** optional field

- **Birth Order:** optional field
    - This identifies the birth order of the patient and should only be used for multiple births (e.g., twins, triplets).
- **Birth Country:** optional field. Defaults to United States
    - Use the drop-down list to select a different country of birth, if applicable.
- **Birth State:** optional field
    - Use the drop-down list to select a state of birth, if applicable.
- **Birth County:** optional field
    - Use the drop-down list to select a county of birth, if applicable.
- **Patient Identifier:** displays organization's primary patient identifier (See the Organization Information section for adding/removing patient identifiers.)

Patient AKA Section

The Patient AKA section gives other names that the patient may be known as. A patient can have several different AKAs.

1. Click the **Patient AKA** heading to expand the information in that section.



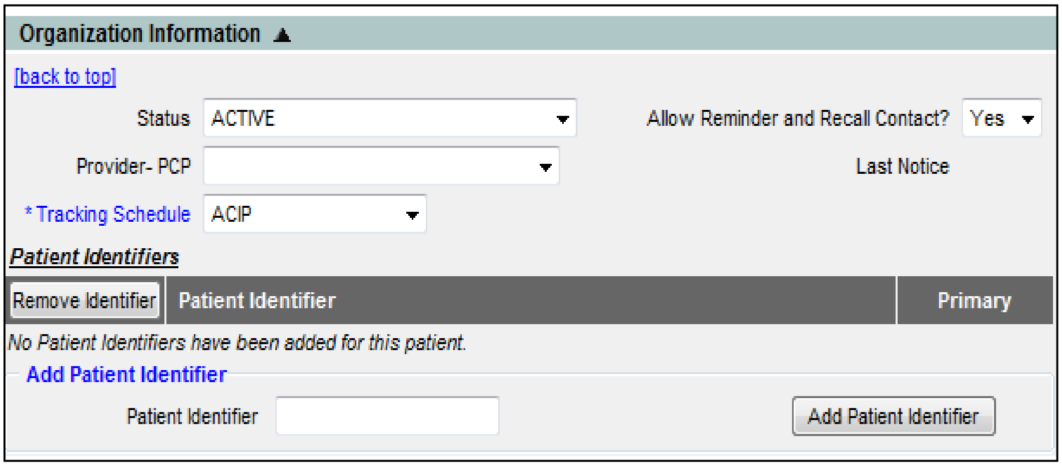
    a. Last Name: required field when entering AKA information
    b. First Name: required field when entering AKA information
    c. Middle Name: optional field

Note: You must click the save button at the top of the screen to finalize any changes to the patient record.

Organization Information Section

The Organization Information section shows organization-specific information about the patient.

1. Click the **Organization Information** heading to expand the information in that section.



   a. **Status:** Click ACTIVE from the drop-down list if you want this patient to be associated with your organization, meaning he or she is receiving immunization services from you. When you specify a patient as INACTIVE, you make him or her inactive for your organization only.

ACTIVE	Patient associated with your organization
INACTIVE-MOGE	Moved or gone elsewhere
INACTIVE-ONE TIME ONLY	Received an immunization once but is not a regular patient
INACTIVE-OTHER	

   b. **Provider-(PCP):** Fill in the patient's primary care physician (PCP) or health care organization from the drop-down list, if provided. This information is used only for reporting and must be set up by your organization's Admin User. For instructions on how to set up the Provider (PCP) field, refer to the Managing Physicians section in Chapter 8.
   c. **Tracking Schedule:** This required field defaults to the Advisory Committee on Immunization Practices (ACIP) schedule. This information affects recall and reminder notices and Comprehensive Clinic Assessment Software Application (CoCASA).
   d. **Allow Reminder and Recall Contact?:** By choosing Yes from the drop-down list you are allowing reminder/recall notices to be sent to this patient when you run the reminder/recall report. If the patient's parent chooses not to have, reminder/recall notices sent choose No from the drop-down list to exclude the patient from the report.
   e. **Patient Identifiers:** A patient may have numerous patient identifiers associated with him or her; each identifier is organization dependent. To enter a patient identifier, type it in and click the Add Patient Identifier button.

Multiple patient identifiers can be saved and a primary patient identifier can be set by selecting the Primary option button.

Deleting an Existing Record

To delete an existing patient identifier:

1. Click the patient identifier you would like to remove by checking the appropriate box on the left.
2. Click the **Remove Identifier** button.
3. Click the **Save** button at the top of the page.

Generation of Reminder and Recall Notices

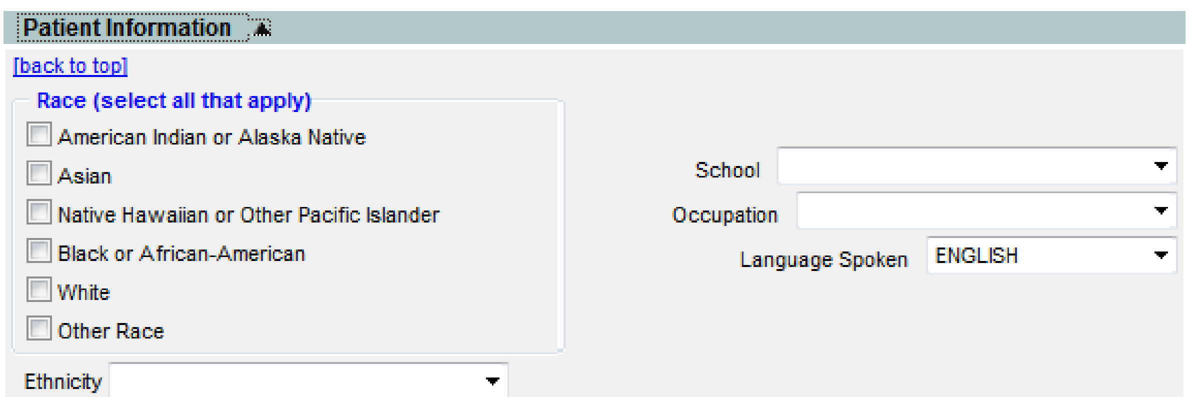
When running the reminder/recall report, letters are generated for every patient when the following conditions are met:

- Patient's status is not set to an INACTIVE status on the Organization Information tab
- Allow Reminder and Recall Contact? Indicator on the Organization Information tab is set to Yes.
- Patient has sufficient address information listed in the Address Information section

Patient Information Section

The Patient Information section gives additional information about the patient.

1. Click the **Patient Information** heading to expand the information in that section.



   a. **Race:** Click the patient's race by selecting the appropriate boxes. Multiple races may be selected.
   b. **Ethnicity:** Click the patient's ethnic background from the drop-down list provided.

c. **School:** Fill in the patient's school from the drop-down list, if provided. This information is used only for reporting and must be set up by the organization's IRIS Admin User. For instructions on how to set up the School field, refer to the Managing Schools section in Chapter 8.

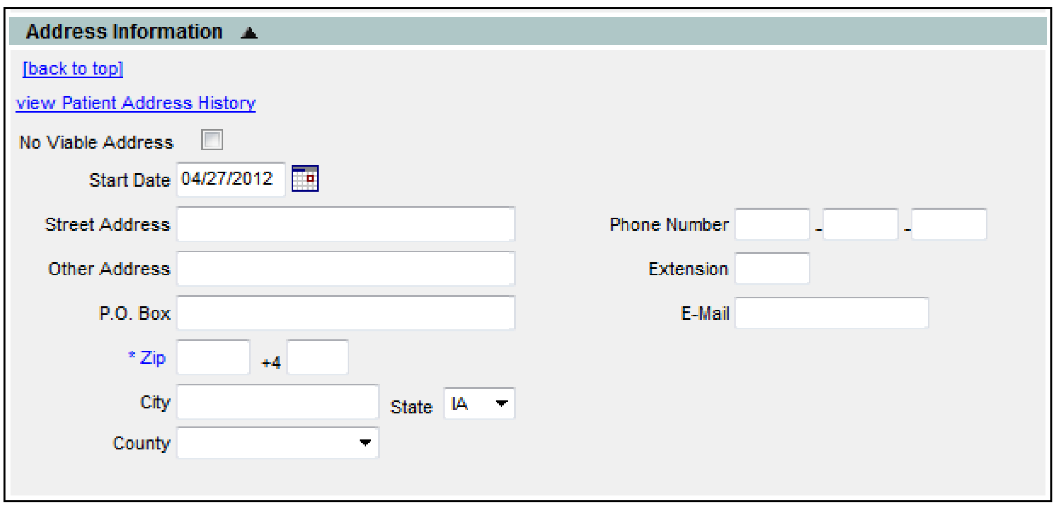
d. **Occupation:** Click the patient's occupation from the drop-down list, if applicable. This field can be used in emergency response situations when certain occupation groups are targeted.

e. **Language Spoken:** Click the primary language spoken by the Patient; this determines the language of the Reminder/Recall letters. English and Spanish are the only options.

Address Information Section

The Address Information section allows you to identify the current address of the patient and view previous addresses.

1. Click the **Address Information** heading to expand the information in that section.



a. **No Viable Address:** Mark this checkbox if information was sent to the patient and the information was returned as not deliverable
b. **Start Date:** Fill in the start date of the address using the MM/DD/YYYY format, or use the calendar by clicking the calendar icon to the right of the field. Click the OK button to enter the Start Date. This is the Start Date of the patient's New Address.
c. **Street Address:** Street Address of the patient
d. **Other Address:** Additional address information - a suite number or apartment number could be entered here
e. **P.O. Box**: Post office box of the patient.
f. **Zip:** required field. Zip code of the patient

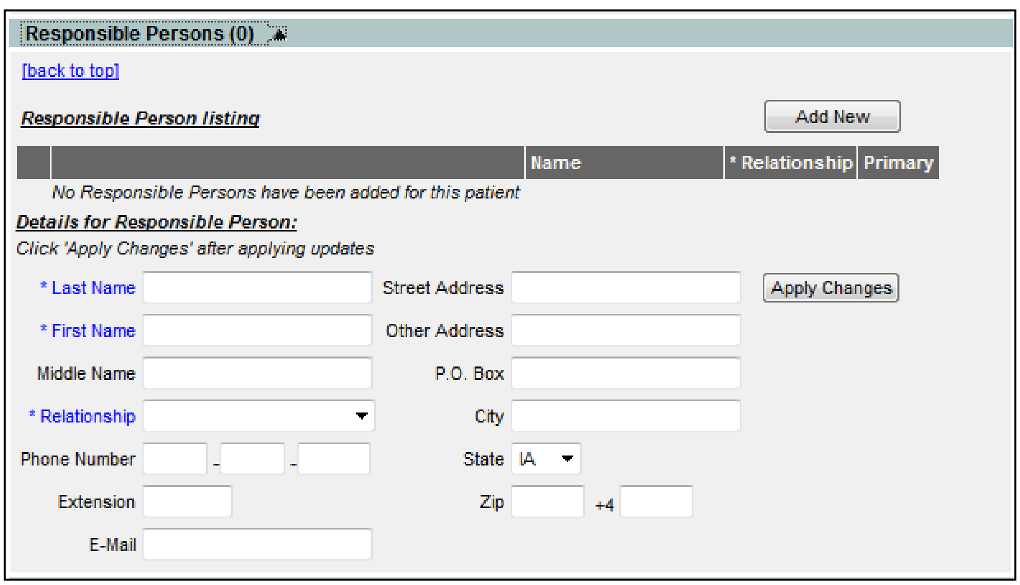
g. **+4:** Extended Zip code numbers of the patient if available
h. **City:** City (or town) of the patient's address
i. **State:** State
j. **County:** County
k. **Phone Number:** Phone Number
l. **Extension:** Phone extension if applicable
m. **Email:** Patient's email address

2. Clicking **View Patient Address History** will present a window with the patient's address history, if available.

Responsible Persons Section

The Responsible Persons section allows you to identify patient emergency contact information. The Reminder/Recall reports feature can also utilize the Responsible Persons information. The only required fields under this section are the Last Name, First Name, and Relationship fields.

- Click the **Responsible Persons** heading to expand the information in that section.



To edit an existing responsible person:

1. Click the **Review** radio button next to the name of the person you wish to edit.
2. Click the **Review** button.
3. Change or add information for the fields listed.

4. Click the **Apply Changes** button.
5. Click the **Save** button at the top of the screen.
6. To enter a new responsible person, click the **Add New** button, and then enter information into the following fields:
    a. **Last Name:** required field
    b. **First Name:** required field
    c. **Middle Name:** optional
    d. **Relationship:** required field
    e. **Phone Number:** responsible person's telephone number, including the area code
    f. **Extension:** responsible person's extension to the above telephone number, if any
    g. **Email:** responsible person's Email address
    h. **Street Address:** responsible person's street address
    i. **Other Address:** responsible person's additional address information - an apartment number could be entered here
    j. **P.O. Box:** responsible person's post office box, or mailing address, if different from the street address
    k. **City:** city or town
    l. **State:** state
    m. **ZIP:** ZIP code
    n. **+4:** +4 code in this field if known
7. To enter a new responsible person and save the information you entered in the Responsible Person Listing, or to view the next responsible person's record, click the **Save** button.
8. To clear existing information and enter a new responsible person, click the **Add New** button.

Deleting an Existing Responsible Person Listing

1. Select the **Remove** check box next to the record you wish to delete on the Responsible Person Listing table.
2. Click the **Remove** button.
3. Click the **Save** button at the top of the screen.

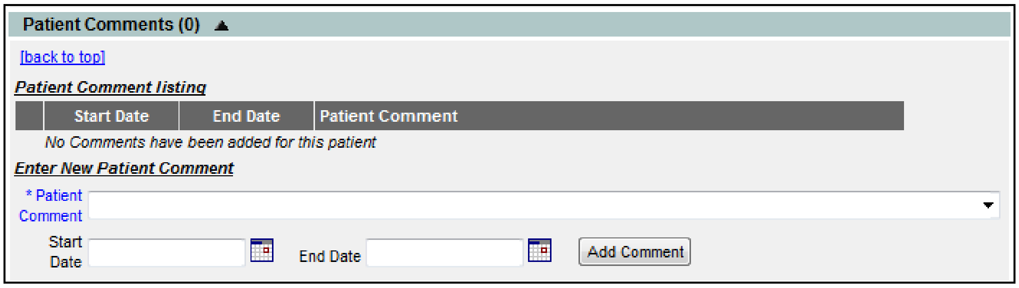
Patient Comments Section

The Patient Comments section allows you to enter immunization-related comments, such as contraindication information for a patient. The patient comments list is derived from a pre-selected CDC-standardized list and is displayed in drop-down list form.

Although the Start Date is not a required field, a start date must be entered with a contraindication comment in order to properly interact with the immunization schedule for the specified vaccine group. If a start date is not entered, the contraindicated vaccine group will still be recommended.

The patient comments are visible at the top of the Immunization History and Edit Immunization pages and the Patient Immunization Records. When using the Print button on the Immunization History page, the comments are displayed on separate lines in the Comments box.

1. Click the **Patient Comments** heading to expand the information in that section.



2. Click the appropriate comment/contraindication from the Patient Comment drop-down list.
3. Enter the date to which the comment refers in the Start Date field. Complete the field using the MM/DD/YYYY format or use the calendar icon. Click the **OK** button.
4. If applicable, enter the date to which the comment ends in the End Date field. Complete the field using the MM/DD/YYYY format, or use the calendar icon. Click the **OK** button.
5. To enter the comment into the Patient Comments Listing, click the **Add Comment** button.
6. Click the **Save** button at the top of the page.

Immunity Comments

Immunity comments are linked to vaccine group recommendations. If a patient has an immunity comment and a Start Date is specified, a recommendation for that vaccine group will not display on the patient's record.

Patient Refusal of Vaccine Comments

IRIS users should enter refusal comments with appropriate Start Dates to document vaccine refusal. This information will help other providers understand why a vaccine group might be overdue for a particular patient in IRIS. Refusal of vaccine will not affect the Forecaster.

Deleting an Existing Comment

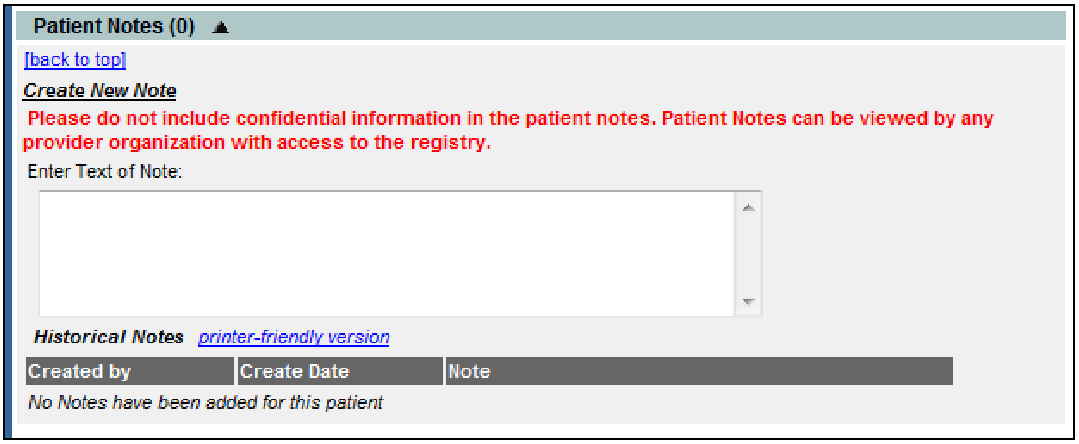
1. Select the **Remove** check box next to the comment you wish to delete on the Patient Comment Listing table.
2. Click the **Remove** button.

3. Click the **Save** button.

Patient Notes Section

The Patient Notes section allows you to enter notes for a patient that may be useful to other clinicians.

1. Click the **Patient Notes** heading to expand the information in that section.



2. Enter Text of Note: Enter text up to 4,000 characters in the text box.
3. Click the **Save** button at the top of the page.

Notes cannot be removed by users. To remove a note, contact the IRIS Help Desk.

Saving Patient Information

There are several ways to save information on the Demographic/Enter New Patient pages:

Save: When clicked, the Save button at the top of the page will save all information fields within each section: Personal Information, Patient AKA, Organization Information, Patient Information, Address Information, Responsible Persons, Patient Comments, and Patients Notes. Once the patient data is saved the message “Patient record successfully saved” will appear at the top of the Personal Information header.

History/Recommend: As with the Save button, the **History/Recommend** button will save all information fields. Once the information is saved the patient’s Immunization History page will display.

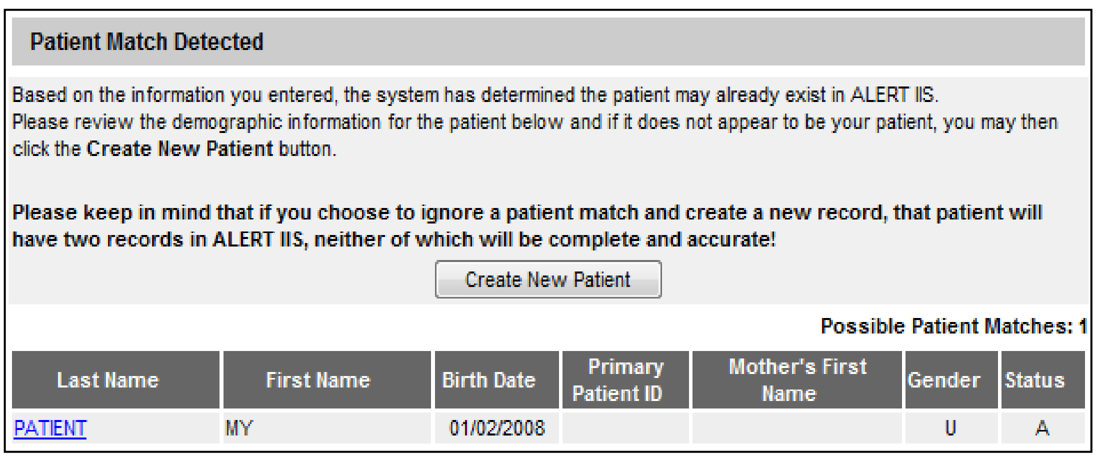
Reports: As with the Save button, the **Reports** button will save all information fields. Once the information is saved, the Reports Available for this Patient page will display, so that a report may be generated for the patient. Refer to the Reports and Forms, chapter 12, for more information on reports.

Cancel: When clicked, the **Cancel** button clears all entered information and **<u>does not save to IRIS</u>**. The Find Patient or Enter New Patient page is displayed.

Deduplication of Patient Records

After you enter a new patient and click one of the buttons that will save the data, IRIS initiates a process that ensures that the patient information you entered does not duplicate a patient that already exists.

If, after attempting to save a new patient, you receive a message box titled “Patient Match Detected”, IRIS has determined that the patient you are attempting to save may already exist in the database. A table below the message box will contain one or more names of potential matches. Click each last name to display his or her information. IRIS will identify matching patients even if the patient has had a name change; therefore, if you do receive a list of potential matches, click the link(s) to determine whether one of the links matches your patient’s record. Review Address, Responsible Persons, and any other information you have to identify matching data.



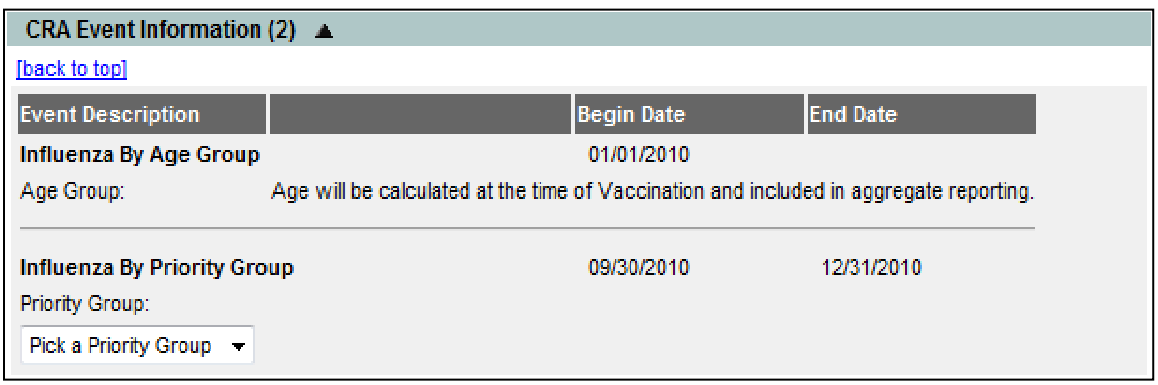
If you do not find a match for your patient after reviewing all the related names, click the Create New Patient button. A confirmation box will appear; click the OK button. Be aware that if you do override the listed matches and create a duplicate record for a patient, it will decrease the accuracy of IRIS data. If you identify possible duplicate patient records, you should call the IRIS Help Desk at 1-800-374-3958.

Countermeasure and Response Administration Module (CRA)

Note: In the event of a public health emergency, IRIS may be used to track the administration of vaccine. In some instances, specific groups may be identified as being at higher risk than the general population and targeted as priority groups to receive the vaccination first.

CRA Event Information Section

If your organization is selected for an event, the CRA Event Information section will be displayed below the Patient Information section of the Demographic page. The CRA Event Information section is used to collect Public Health data during a pandemic response event or preparedness exercise. During an ongoing event, the CRA Event Information section will be displayed on the Edit/Enter New Patient page. Based on candidate screening; select the appropriate priority group category for each patient.



- Effective Events are displayed.
- The Age Group is not required and will be calculated at the time of vaccination.
- The Priority Group Value (Code) is displayed in the drop-down list. When selected, a full description of the selected priority group will be listed to the right of the drop-down list.

Chapter 11 Managing Immunizations

In this chapter:

IRIS allows you to view and manage historical immunization information and add new immunizations for a patient. IRIS also recommends immunizations based on the ACIP tracking schedule.
Immunization information for a specific patient may be accessed one of two ways:

1. Click **Manage Patient** under the Patients section of the menu panel. This will display the Patient Search page. For information on finding patients, refer to Chapter 10, Managing Patients. Once a patient is retrieved, click the History/Recommend button to display the patient's Immunization Record page.

   Or

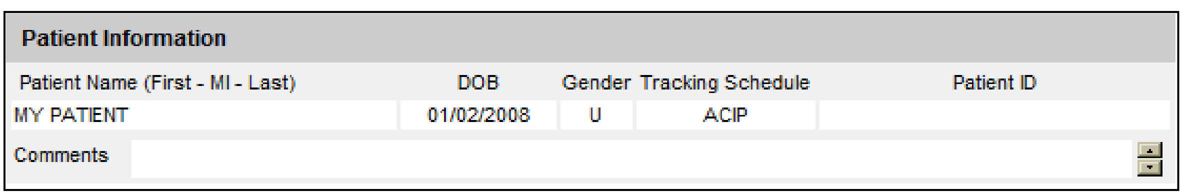
2. Click **Manage Immunizations** under the Immunizations section of the menu panel. This will bring up the Patient Search page. For information on finding patients, refer to Chapter 10, Managing Patients. Once a patient is retrieved, the patient's Immunization Record page displays.

Viewing Patient Immunization Information

The Immunization Record page holds a large amount of information on each patient in IRIS. The page has three sections: Patient Information, Immunization Record, and Vaccines Recommended by Selected Tracking Schedule.

Patient Information

The Patient Information section at the top of the Immunization Record page displays information on the patient, such as name, DOB, gender, Tracking Schedule, Patient ID, address, phone, and a scrollable list of comments. Use this information to verify that the patient indicated is the patient for whom you were searching. To edit this information, Click the Edit Patient button and refer to the Editing/Entering Patient Information section in Chapter 10, Managing Patients.



Between the Patient Information section and the Immunization Record section, the patient's exact age is shown in a solid blue field. The age also displays on the printable version of this page.

Immunization Record

This table lists all the immunizations the patient has received to date that have been entered into IRIS. Immunizations are listed alphabetically by vaccine group and ordered by Date Administered.

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Edit
DTP/aP	03/02/2008	1 of 5	DTaP, NOS				Yes	
HepB	01/02/2008	1 of 3	HepB, NOS [HepB ®]				Yes	
	03/02/2008	2 of 3	HepB, NOS [HepB ®]				Yes	
Rotavirus	03/02/2008	1 of 3	Rotavirus, NOS				Yes	
Td/Tdap	03/02/2008		DTaP, NOS				Yes	

Vaccine Group: the vaccine group name

Date Administered: the date the patient was given the vaccine. To view the tracking schedule information for the selected immunization, or an explanation of why an immunization is not valid or appropriate, click this date.

Series: denotes the sequence number within the immunization series. A vaccine may show as invalid because the patient was not old enough to receive it or not enough time has elapsed between doses. "SUBPOTENT" will display if the shot is flagged as a Subpotent Dose.

Trade Name*:* the manufacturer's trade name of the vaccine

Dose: indicates whether full, half or multiple doses were administered to the patient. If the Dose field is blank, assume that the default "full" dose was administered.

Owned?: If the value in the owned column is blank, the immunization data is owned by your organization. This is a result of either manual data entry of this information or having sent it via data exchange. This only indicates the organization submitting the data; it has nothing to do with the organization that administered the shot to the patient.

"If the value in the Owned?" column is "No", the immunization data is not owned by your organization. This indicates that your organization did not enter the shot information into IRIS. Click "No" to display who owns the shot information.

Reaction: If this column indicates “Yes” and appears in red, this means a reaction to a vaccine was recorded. To view the patient’s reaction, Click the “Yes” link in the Reaction column or Click the notepad icon in the “Edit” column.

Hist?: If this column indicates “Yes”, this record is historical, meaning the immunization was administered by a provider at another organization, not the organization that owns the data. If this column is blank, this indicates the immunization was administered by the organization that owns the data (i.e. entered the data into IRIS).

Edit: When you click the notepad icon in this column, you will be able to edit some fields for the recorded immunization using the Edit Immunization page, as long as the immunization is owned by your organization or is historical. You will also be able to see more details about the immunization, including vaccine lot number and VFC status (if applicable). Click the Edit button to enter a reaction to the immunization or mark it as a subpotent dose. Details on editing immunizations are covered in more detail later in this chapter.

Note: Owned vs. Not Owned Immunizations

A single provider does not own any of the patients within IRIS, but an organization does own the immunization data it enters into the system. If the Owned column on the Immunization Record table shows a “No” for one or more vaccines, this indicates that another organization entered the vaccine information and is attesting to the validity of the information.

Any provider may edit a historical immunization, but “new” or non-historical shots may only be edited by the organization that administered the vaccine and entered the data in IRIS. The exception is that any user can enter a reaction to any immunization or mark it as a subpotent dose.

Validation of Combination Vaccines

IRIS validates each vaccine group component separately when recording combination vaccines. For example, if Comvax, which is a combination of Hib and Hep B was administered, and only one component is valid, that component will be treated as if it were a single vaccine and validated. The other component will be displayed as “Not Valid”. The component that is not valid will not be counted in series.

Vaccines Recommended by Selected Tracking Schedule

This table, known as the Forecaster, lists all vaccines recommended by the ACIP tracking schedule associated with the patient. Immunizations are listed alphabetically.

Vaccines Recommended by Selected Tracking Schedule

Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
	DTP/aP	DTaP, NOS	03/30/2008	05/02/2008	06/02/2008
	HepA	HepA, NOS	01/02/2009	01/02/2009	08/02/2009
	HepB	HepB, NOS	Complete		
	Hib	Hib, NOS	04/02/2009	04/02/2009	04/02/2009
	Influenza-seasnl	Influenza, NOS	07/02/2008	08/01/2010	08/02/2008
	MMR	MMR	01/02/2009	01/02/2009	05/02/2009
	PneumoConjugate	PCV7	01/02/2010	01/02/2010	01/02/2010
	Polio	Polio, NOS	02/13/2008	03/02/2008	04/02/2008
	Rotavirus	Rotavirus, NOS	Maximum Age Exceeded		
	Varicella	Varicella	01/02/2009	01/02/2009	05/02/2009

Add Selected

Select: allows users to manually check inclusion in the Vaccines Recommended section. When the Add Selected button is clicked, the Enter New Immunizations page will open with the check-marked selections displayed.

Vaccine Group: lists the vaccine group name. To view the tracking schedule information for the selected immunization, click the vaccine group name.

Vaccine: lists the vaccine name.

Earliest Date: the earliest date that the patient may receive the vaccine.

Recommended Date: the recommended date that the patient should receive the vaccine.

Past Due Date: the date at which the patient is past due for the immunization.

Immunization Color Coding

The dates found in the Vaccines Recommended by Selected Tracking Schedule table are shaded with color for emphasis. For a detailed listing of color definitions, click the online help icon on the Immunization Record page. The colors applied to the dates within the columns are defined as follows:

Green: Color that will fill the background for the Vaccine Group and Date columns when a dose in that family is recommended or past due.

Gray: Vaccine statuses that will show gray color: Complete, Contraindicated, Maximum Age Exceeded, Immunity, and Medical Exemption.

Other Features on the Immunization Record Page

The Immunization Record page contains links to other IRIS functions:

Edit Patient: Clicking this button will return you to the Demographic page for the patient.

Reports: Clicking this button will bring you to the Reports Available for This Patient page. You may generate Patient-specific reports. Refer to Forms and Reports in Chapter 12 of this manual for more information.

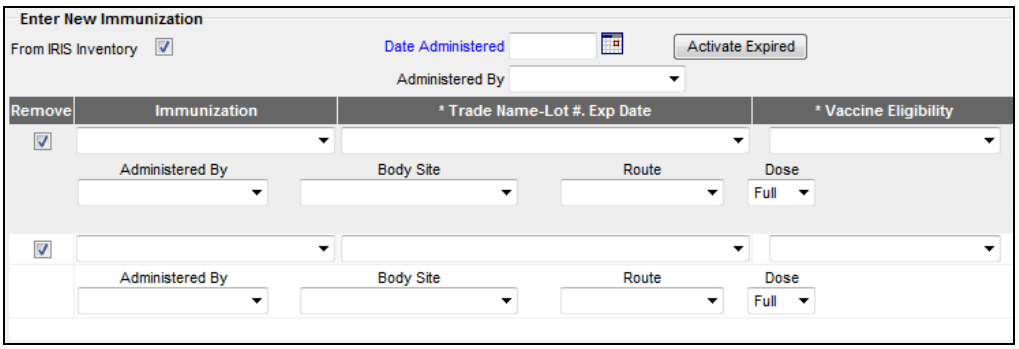
Print Record: Clicking this button will display the patient's immunization information without the top or side IRIS menus. To print this page, click the printer icon on your browser's tool bar or click File, Print and click OK. Click the browser's Back button to return to the Patient Immunization Information page.

Print Confidential Record: Clicking on this button will display the patient's immunization information without top or side IRIS menus and without confidential patient information. To print this window, click the printer icon on your browser or click File, Print, and click OK. Click your browser's Back button to return to the Patient Immunization Information page.

Entering Immunizations

To add new immunizations:

1. To enter immunizations using the **Add Selected** button in the bottom right corner of the page, click the boxes of the appropriate immunizations under the Vaccines Recommended section and click the Add Selected button.
2. To enter immunizations without using the Add Selected button, click the **Add New Imms** button to display the Enter New Immunization page.
3. To add immunizations from IRIS Inventory, click the check box **From IRIS Inventory**. This will deduct the immunization from your vaccine inventory.



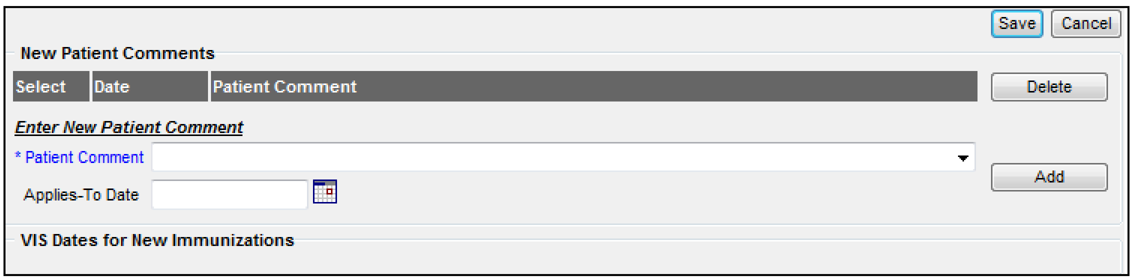
a. Click a date for the Date Administered field using the MM/DD/YYYY format, or use the calendar by clicking the calendar icon to the right of the field drop-down
b. You may choose an Administered By value for new immunizations by clicking the drop-down list in the Enter New Immunization section. You will be able to edit these fields for each immunization on the Record Immunizations page. These fields are set up and managed by the Admin User for your organization. Refer to “Managing Clinicians” (Chapter 8).
c. Remove box: click when removing an immunization.
d. Immunization: click from the drop-down list. This will uncheck the Remove box.
e. Trade Name-Lot #, Exp Date: click or enter the appropriate Trade-Name-Lot #, Exp Date. (If using vaccine from Inventory, the trade names and lot numbers will be listed in the drop-down menu.)
f. Vaccine Eligibility: click the appropriate vaccine eligibility for this patient’s immunization. The vaccine eligibility drop-down list will display according to organization type. *Required
g. Administered By: Select the appropriate clinician who administered the immunization(s).
h. Body Site: click the appropriate body site for the immunization.
i. Route: click the appropriate route for the immunization.

j. Dose: click the appropriate dose for the immunization. The dose will default to Full.

Repeat these steps for each new immunization you are entering.

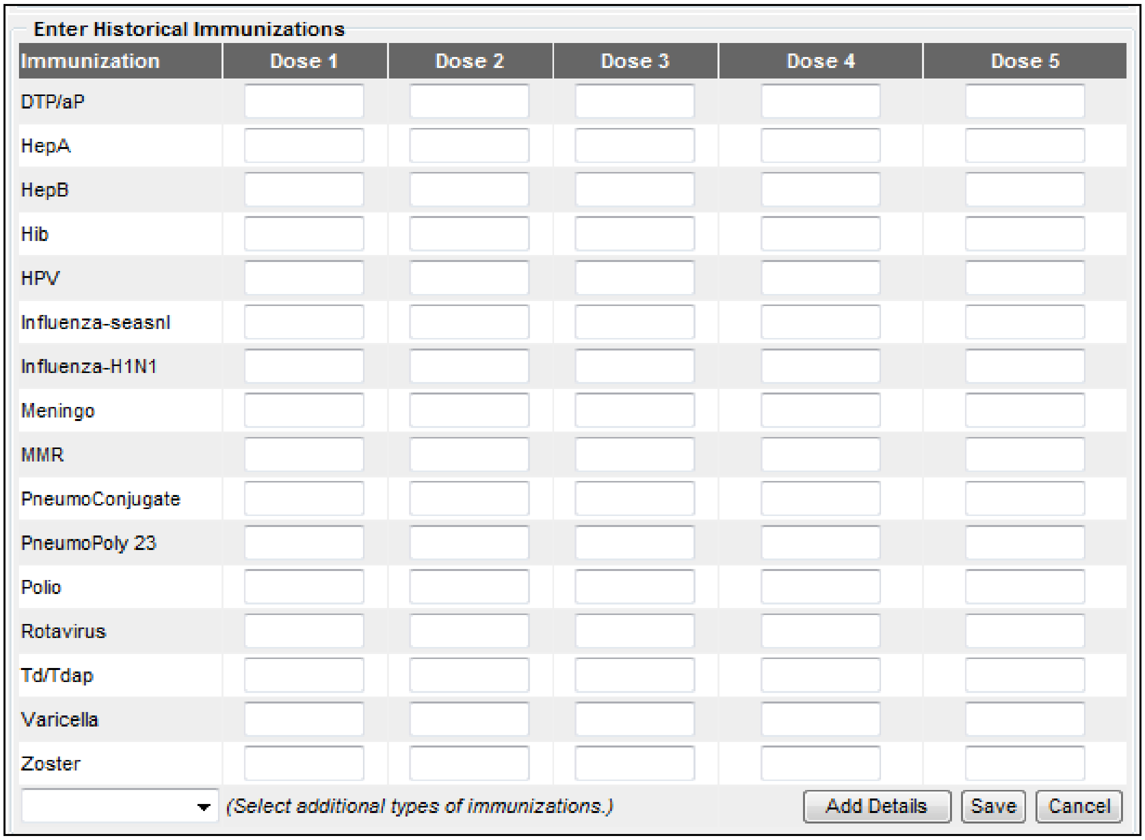
To Add New Patient Comments:

1. New Patient Comments: If necessary, select the appropriate comment from the drop-down list. Add an “Applies-To Date” by using the MM/DD/YYYY format, or use the calendar by clicking the calendar icon to the right of the field. Click the Add button to add patient comment to the record. For more information on Patient Comments, see Managing Patients, Chapter 10.
2. Click the Save button to save your immunization entry.



To Add Historical Immunizations:

1. Click the **Add Historical Imms** button to display the Enter Historical Immunizations page.
2. Enter Doses 1 – 5 for immunizations being historically recorded by using the MM/DD/YYYY format. For those immunizations not being recorded, leave the box blank.



3. Click the **Enter Details** button to enter the Trade Name, Lot Number, Provider Org, and Source of Immunization.
4. Click the **Save** button to save your immunization entry.

Note: At the bottom of the Immunization Details Entry page, default VIS dates will be displayed for each new immunization entered.

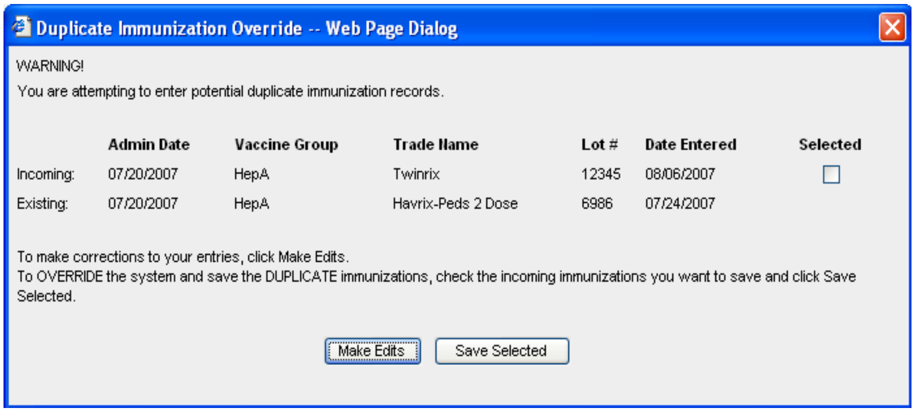
Duplicate Immunizations

IRIS does not allow duplicate immunizations to be entered for a patient. If you attempt to enter an immunization for a patient given within two days before or after an existing immunization with the same trade name, you will receive the message, “Possible duplicate immunizations exist. Modify or delete your entries.” IRIS will then allow you to change or delete the entry(s) in question.

If you receive a duplicate immunizations override warning:

1. In the Duplicate Immunization Override warning dialog box, review all immunizations to determine whether there are any duplicates.\

a. If the immunization(s) you entered need to be removed or edited, click “Make Edits”. At the Enter New Immunization or Enter Historical Immunizations page, make changes or remove immunizations as needed. Click the **OK** button.



b. If an Immunization listed in the warning dialog box is not a duplicate, select the checkbox next to the immunization to enter it as a separate vaccine event and click the Save Selected button.

Note: The following scenarios explain how IRIS overrides duplicate immunization records:

- If there is a historical immunization on file and the same, immunization is entered as administered from IRIS inventory or data exchange, no warning message will appear; instead, it processes the new immunization and removes the historical immunization.
- If there is a historical immunization on file and a matching historical immunization is entered, a warning message will appear. The user then has the choice to cancel the new immunization or save it anyway (adding a duplicate immunization). The user would need to explicitly delete the historical immunization to remove the duplicate records.

Applying a Prerequisite Override to a Patient's Immunization

A prerequisite override is a command within a tracking schedule that allows users to override a prerequisite vaccine once a patient reaches a certain age. A prerequisite override is not automatically applied to an individual patient's immunization record. To apply a prerequisite override to an immunization:

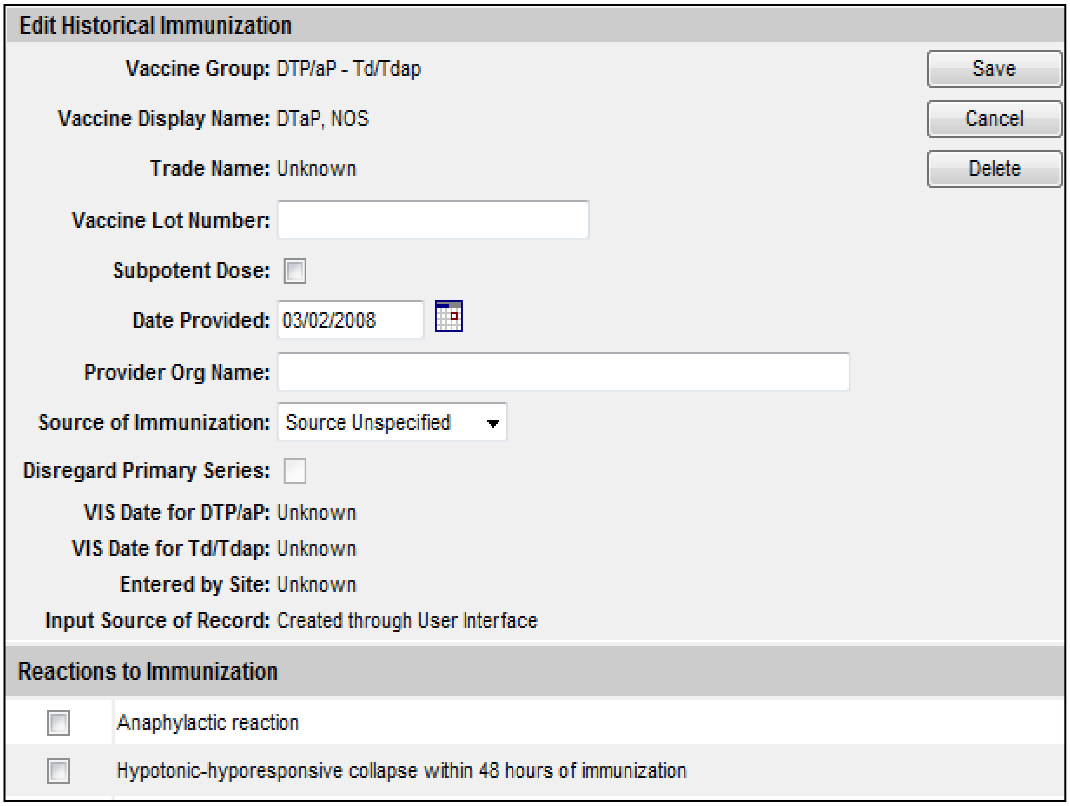
1. Enter the immunization as described in the Entering Immunizations section of this chapter. You may notice that, as in the case of Td, the immunization will appear on the immunization history as one of a series, when in fact it is a booster immunization. The next two steps will correct this.
2. Follow Steps 1-3 in the Editing Owned Immunization from the Inventory section of this chapter.
3. In the field marked Disregard Primary Series, click Yes. This field will only appear open if the conditions (the chosen tracking schedule has an override on the vaccine and the age of the patient is greater than or equal to the override age) meet those of the prerequisite override.
4. Click **Save**.

Editing Immunizations

Editing or Deleting Historical Immunizations

To edit or delete a historical immunization:

1. On the Immunization Record table, select the historical vaccine record you wish to edit by clicking the vaccine's notepad icon  in the "Edit" column.



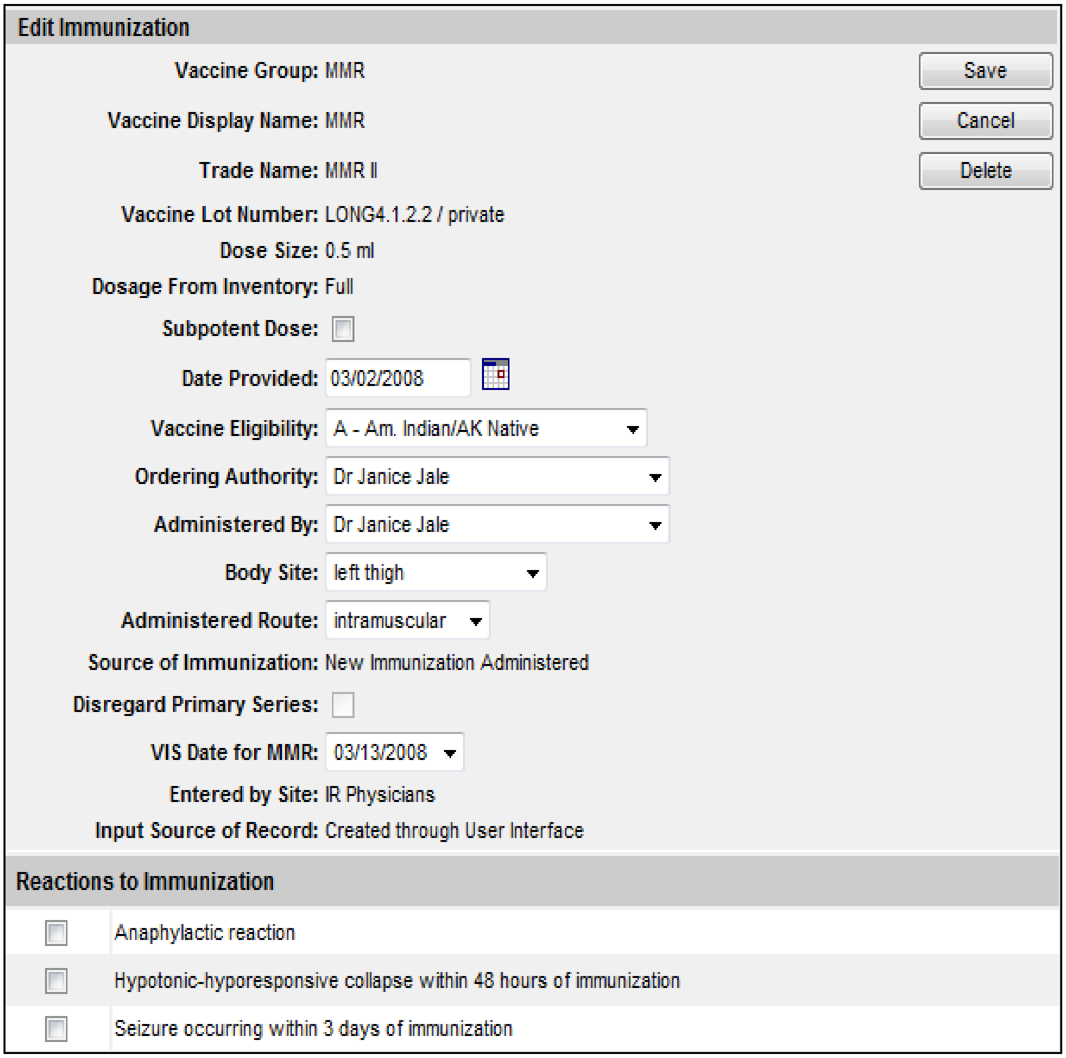
2. On the Edit Historical Immunization page, you may edit information for the Vaccine Lot Number, Subpotent Dose, Date Provided, Provider Organization Name, Source of Immunization fields; you many also select the box for Disregard Primary Series.
3. To record a reaction to a vaccine, check the box to the left of the reaction in the Reactions to Immunization section.
4. To delete the historical immunization, click the **Delete** button.
5. Click the **Save** button.

Editing Owned Immunizations

An immunization that is not historical is one that was given out of an organization's inventory or submitted via electronic data exchange as administered. You will not be able to edit non-historical immunizations that are owned by another organization.

To edit an immunization record that is an owned immunization, administered by your organization:

1. On the Immunization History table, select the vaccine record you wish to edit by clicking the vaccine's notepad icon in the Edit column.



Edit Immunization

Vaccine Group: MMR
Vaccine Display Name: MMR
Trade Name: MMR II
Vaccine Lot Number: LONG4.1.2.2 / private
Dose Size: 0.5 ml
Dosage From Inventory: Full
Subpotent Dose:
Date Provided: 03/02/2008
Vaccine Eligibility: A - Am. Indian/AK Native
Ordering Authority: Dr Janice Jale
Administered By: Dr Janice Jale
Body Site: left thigh
Administered Route: intramuscular
Source of Immunization: New Immunization Administered
Disregard Primary Series:
VIS Date for MMR: 03/13/2008
Entered by Site: IR Physicians
Input Source of Record: Created through User Interface

Save
Cancel
Delete

Reactions to Immunization

Anaphylactic reaction
Hypotonic-hyporesponsive collapse within 48 hours of immunization
Seizure occurring within 3 days of immunization

2. To indicate a partial dosage, check the **Subpotent Dose** checkbox. For example, check this box if a partial dosage was administered.
3. Update information in the Date Provided, Vaccine Eligibility, Ordering Authority, Administered By, Body Site and/or Administered Route fields on the Edit Immunization page.
4. To indicate a Vaccine Information Statement (VIS) date other than the most current (default) date, click an alternate date from the drop-down list.
5. To record a reaction to the immunization, check the box next to the applicable reaction.
6. Click the **Save** button.

Deleting Owned Immunizations

Note that you will not be able to delete non-historical immunizations that are owned by another organization.

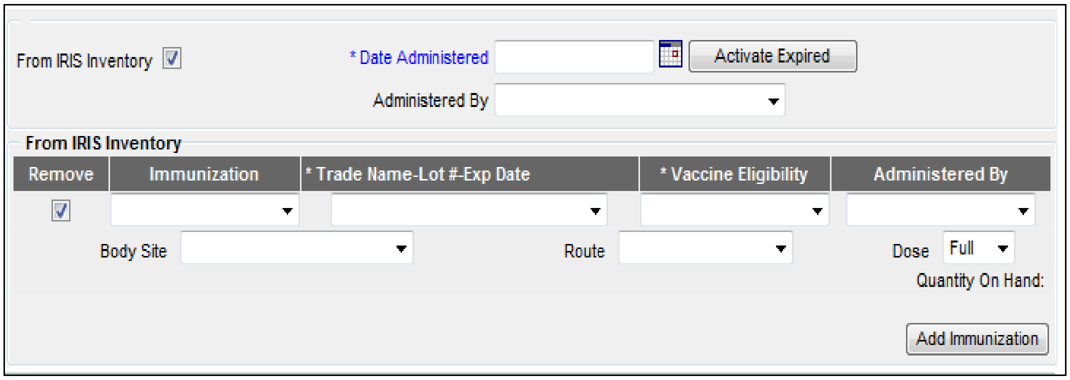
1. On the Immunization History table, select the vaccine you wish to delete by clicking on the vaccine's notebook icon in the Edit column.
2. At the Edit Immunization page, click the **Delete** button.
3. Click the **OK** button in the confirmation box.

Mass Vaccination Entry

The IRIS application allows a user to enter a set number of immunizations for a large number of patients using the Mass Vaccination Entry module. To enter immunizations for a list of patients use the following steps:

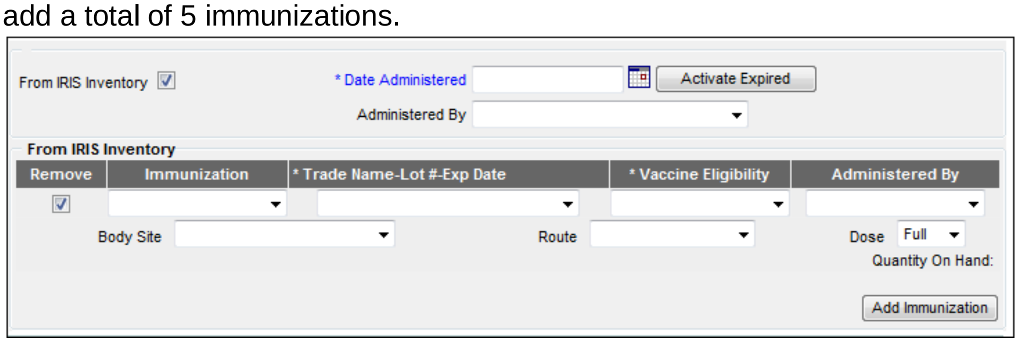
1. Click Mass Vaccination Entry under the Mass Vaccination header in the left navigation menu.
2. On the Mass Vaccination List page the user may enter the name of a new list and click Save or select click the blue hyperlink of an existing list under the Report List section to add patients to an existing list.

3. On the Mass Vaccination List page, the user may select a Roster Event from the drop down menu. For more information on CRA Events please see the section that follows on page 105.
4. To add immunizations from IRIS Inventory, click the check box From IRIS Inventory in the List Immunization Information section. This will deduct the immunization from your vaccine inventory.

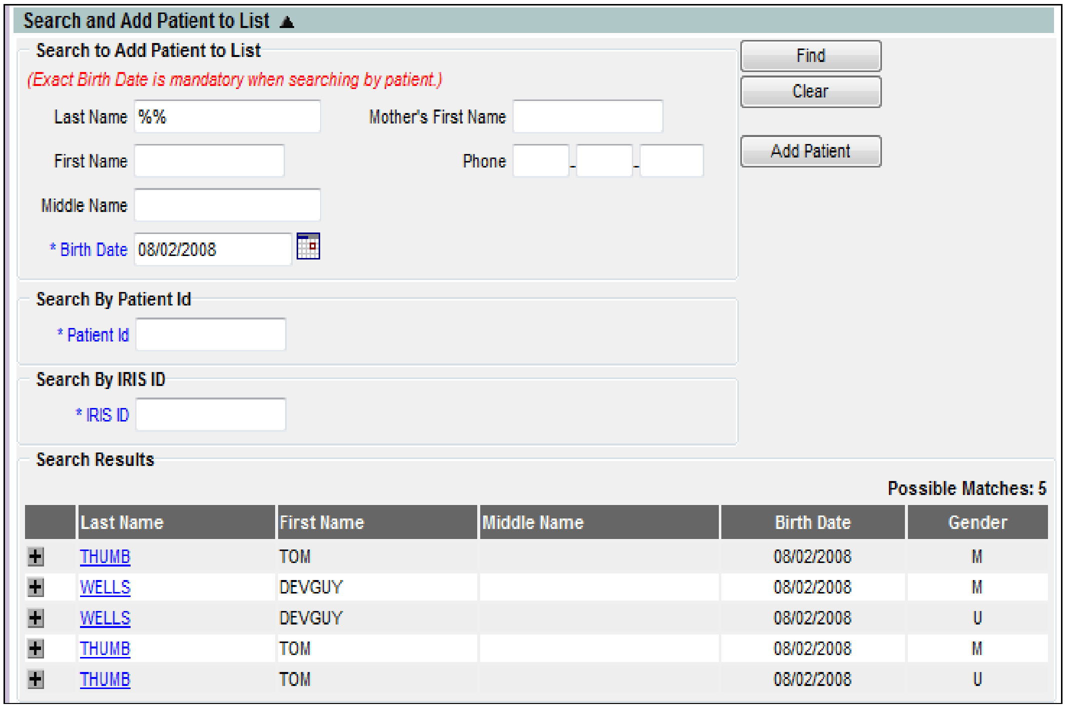


a. Click a date for the Date Administered field using the MM/DD/YYYY format, or use the calendar by clicking the calendar icon to the right of the field drop-down.
b. You may choose an Administered By value for new immunizations by clicking the drop-down list in the Enter New Immunization section. You will be able to edit these fields for each immunization on the Record Immunizations page. These fields are set up and managed by the Administrative User for your organization. Refer to “Managing Clinicians” (Chapter 8).
c. Remove box: click when removing an immunization.
d. Immunization: click from the drop-down list.
e. Trade Name: click from the drop-down list.
f. Lot: click or enter the appropriate Lot. (If using vaccine from Inventory, the trade names and lot numbers will be listed in the drop-down menu.)
g. Vaccine Eligibility: click the appropriate vaccine eligibility for this patient’s immunization. The vaccine eligibility drop-down list will display according to organization type.
h. Body Site: click the appropriate body site for the immunization.
i. Route: click the appropriate route for the immunization.
j. Dose: click the appropriate dose for the immunization. The dose will default to Full.
k. Edits are in place to display a warning message if a public dose was administered to a non- eligible patient, or vice versa. User can override the warnings if the administration information is correct.

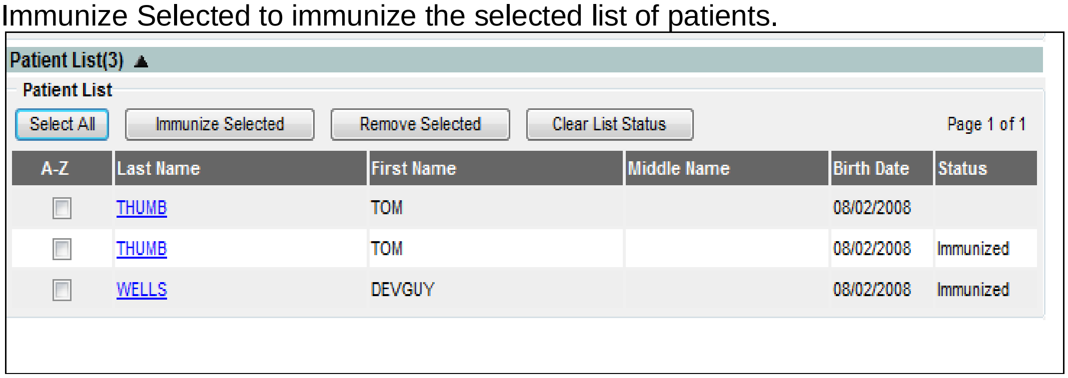
5. Note: to add another immunization, click the Add Immunization button. The user may add a total of 5 immunizations.



6. Once all immunization information has been entered, the user can search for patients to add to the Patient List. Enter the search criteria for the patient and click Find. If only one patient is found the patient will be added to the Patient List. If multiple patients are found, click the blue name hyperlink to view demographic information for patients. Click the '+' button to add the patient to the list.



7. Once all the patients are added to the Patient List the user may click the Select All/Unselect All button to check or uncheck patients in the Patient List and Click Immunize Selected to immunize the selected list of patients.



8. To Remove patients from the list, click the checkbox next to select patients' names or click Select All to select all patients on the list. Click the Remove Selected button to remove the selected patients.

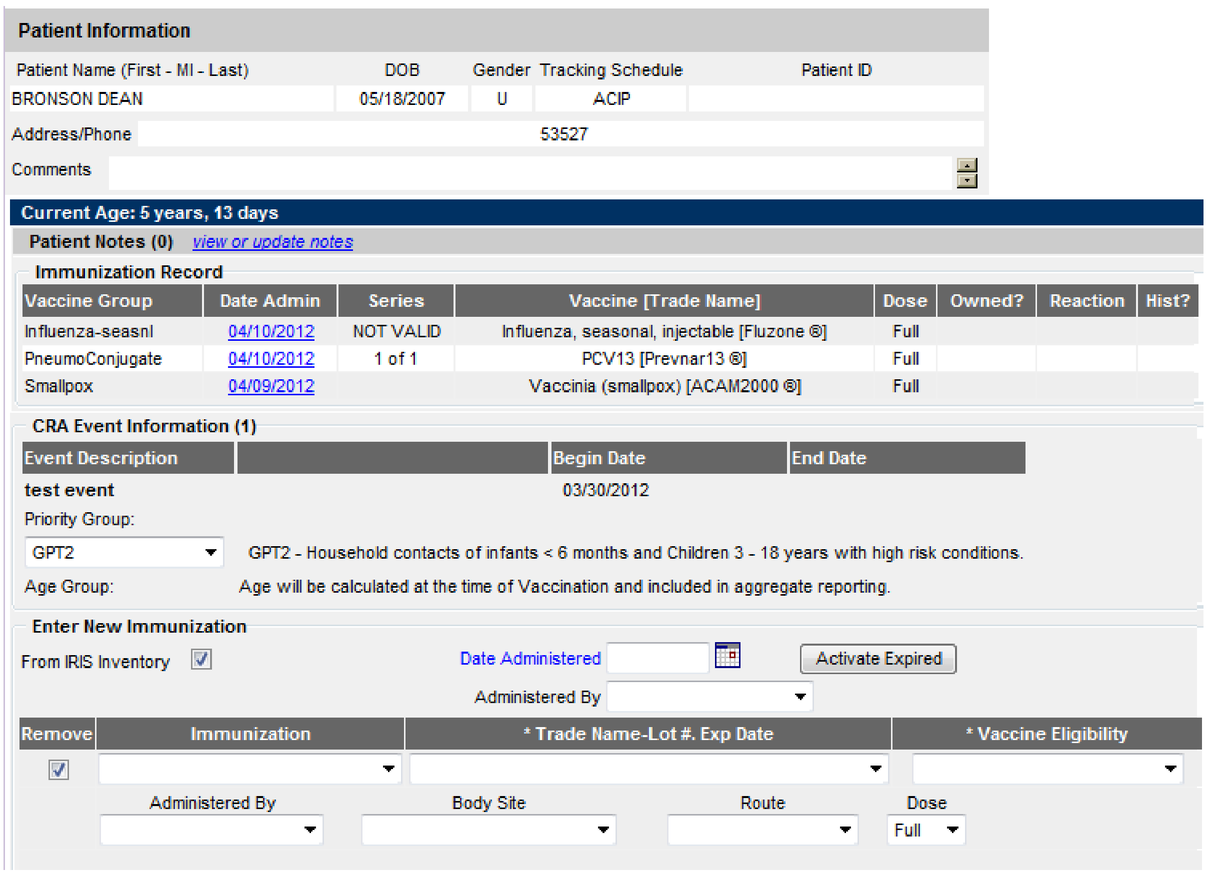
9. Once immunizations have been administered, a status message 'Immunized' will appear in the Status column. The user can clear all status messages in the Status column by clicking the Clear List Status button.
10. The Patient List displays 50 patients per page. When a Patient List exceeds 1 page the <u><<</u> <u><</u> <u>></u> <u>>></u> arrows will appear next to the page count. The user can tab through

pages in the list by clicking the arrows. Patients will be sorted alphabetically by last name.

Countermeasure and Response Administration (CRA)

In the event of a public health emergency, IRIS may be used to track the administration of vaccine. In some cases, specific patient groups may be identified as being at higher risk than the general population and targeted to receive the vaccination first. These groups are called priority groups.

The CRA Event Information section is used to collect public health data during a pandemic event or preparedness exercise (such as the response event to a pandemic influenza outbreak.). If your organization is selected for an event, the CRA Event Information section will be displayed on the Record Immunizations page. Based on candidate screening, click the appropriate priority group category for each patient.



Chapter 12
Forms and Reports

In this chapter:

Forms Tab
Patient Level Reports
Immunization History Report
Immunizations Needed Report
Provisional Certificate of Immunization
Certificate of Immunization
Master Index Card
Patient Reminder Letter
Ad Hoc Reports
Assessment Report
Benchmark Report
Doses Administered
Group Patients
Reminder/Recall
Vaccine Eligibility

Forms Tab

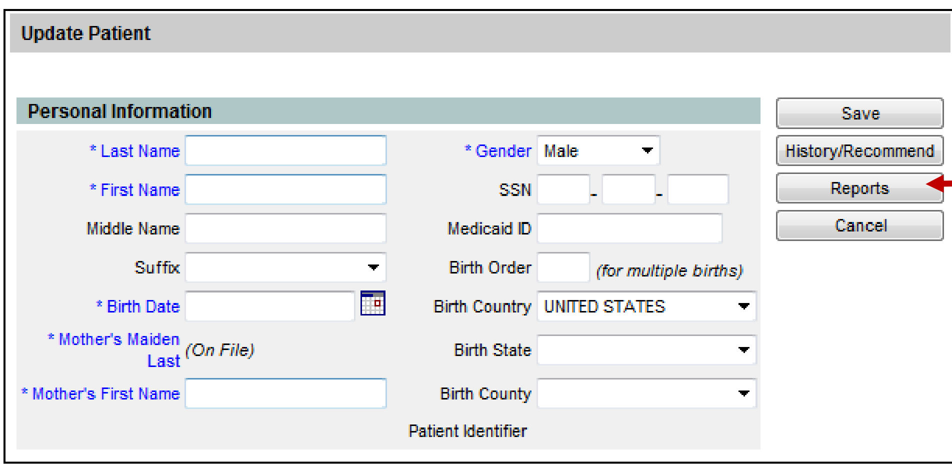
The Forms tab at the top of the IRIS web page gives users access to several IRIS related forms. You can also access this tab prior to logging into IRIS.

To access forms, click the **Forms** tab in the top menu bar.

Patient Level Reports

For all patients in IRIS, you may generate the following reports from the Patient Reports Screen:

- Immunization History Report
- Immunizations Needed
- Provisional Certificate of Immunization
- Certificate of Immunization
- Master Index Card
- Reminder Letter



Patient Information

Patient Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Patient ID
BRONSON DEAN	05/18/2007	M	ACIP	

Address/Phone 53527

Comments

Reports Available for this Patient

Report	Description
Immunization History Report	Displays demographics, registry data, contact information, as well as detailed immunization history.
Immunizations Needed	Displays demographics, contact information, immunization history, as well as immunizations needed.
Provisional Certificate of Immunization	This certificate is the official Provisional Certificate of Immunization to be used when a child has begun but not completed the vaccines required for entry into licensed child care and school.
Certificate of Immunization	This certificate is the official Certificate of Immunization required for children entering licensed child care and school.
Master Index Card	This is designed as an internal document for health care providers to maintain a patient's immunizations on a two-page record. It is not an official Certificate of Immunization.
Reminder Letter	Prints patient reminder letter which includes the patient vaccination record and the recommend vaccines to be received.

Report Viewing Requirements

Get ADOBE® READER®

IRIS reports are best viewed with Adobe Reader 6.0 or later.
Earlier versions of Adobe may work, but there may be formatting differences. If you do not have a qualifying version, click the Adobe image to the left to download the current version of Adobe Reader. In addition, you will find helpful guidelines at the Adobe Support Site for configuring Adobe Reader to work with your browser. Troubleshooting guidelines for popular browsers may be found by clicking here.

Immunization History Report

The Immunization History Report displays demographics, contact information, and a detailed summary of the patient's immunization history. To generate the report, follow these steps:

1. From a patient's Manage Patient screen or Manage Immunizations screen, click the **Reports** button.
2. At the Reports Available for this Patient section, click **Immunization History Report**, this is a hyperlink.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.

31 May 2012

Iowa Immunization Registry Information System

IR Physicians

Immunization History Report

Patient ID: Tracking Schedule: **ACIP**

Patient Name: **BRONSON DEAN**

Birth Date: **05/18/2007** Gender: **Unknown**

Age: **5 years, 13 days**

Immun	Date Admin	Series	Vaccine [Trade Name]	Dose	Mfg Code	Lot #	Bod Rt.	Bod St.	Provider of Information	React
Influenza-seasnl	04/10/2012	Not Valid	Influenza, seasonal, injectable [Fluzone ®]	Full	PMC	Fluzone w/ NDC			IR Physicians	
PneumoConjugate	04/10/2012	1 of 1	PCV13 [Prevnar13 ®]	Full	PFR	Prevnar / NDC			IR Physicians	
Smallpox	04/09/2012		Vaccinia (smallpox) [ACAM2000 ®]	Full	PMC	LUIS ACAM			IR Physicians	

Reaction Descriptions:
No Records Found.

Patient Comments: **Start Date:** **End Date:**
No Records Found.

4. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
5. To return to the Patient Reports screen, you may close the Acrobat Reader® by clicking the X button in the upper right corner of the Immunization History Report window.

Immunizations Needed Report

The Immunizations Needed report displays demographics, contact information, immunization record, and immunizations recommended by date according to the tracking schedule assigned to the patient. This report can be provided to parents and guardians for their records and helps to identify upcoming immunizations for their children. In addition, it provides a place for the next appointment date and organization phone number. To generate the report, follow these steps:

1. From a patient's Manage Patient screen or Manage Immunizations screen, click **Reports**.
2. At the Reports Available for this Patient section, click **Immunizations Needed**, which is a hyperlink.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.

31 May 2012 **Iowa Immunization Registry Information System** Page 1 of 1

Immunization Record

Patient ID: ____________ Race: Tracking Schedule **ACIP**
Patient Name (L,F,M): **DEAN, BRONSON** Ethnicity:
Birth Date: **05/18/2007** Gender: **Unknown**
Age: **5 years 13 days**

Patient Comments: No Comments Found **From Date:** **To Date:**

Immunization Record

Immunization	Date Admin	Series	Vaccine [Trade Name]	Dose	Reaction
Influenza-seasnl	04/10/2012	Not Valid	Influenza, seasonal, injectable [Influen		
PneumoConjugat	04/10/2012	1 of 1	PCV13 [PneumoConjugate]		
Smallpox	04/09/2012		Vaccinia (smallpox) [Smallpox]		

Immunizations Due

Vaccine	Date Needed
PCV7	Complete
HepB, NOS	05/18/2007
DTaP, NOS	07/18/2007
Polio-Inject	07/18/2007
HepA, NOS	05/18/2008
MMR	05/18/2008
Varicella	05/18/2008
Influenza, NOS	05/08/2012

Appointment: ______/______/__________ **Provider Phone Number:** ____________________

4. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.

5. To return to the Patient Reports screen, you may close the Acrobat Reader® by clicking the X button in the upper right corner of the Immunization History Report window.

Provisional Certificate of Immunization

This certificate is the official Provisional Certificate of Immunization to be used for entry into licensed child care and school in the state of Iowa when a child has begun but not completed the vaccines or is a transfer student from another school system.

IDPH

Iowa Department of Public Health
Provisional Certificate of Immunization

This applicant shall submit this certificate to the admitting official of the school or child care center.
A copy of this certificate should be provided to the applicant, parent, or guardian.

Name Last: DEAN First: BRONSON Middle: ______ Date of Birth: 05/18/2007

This applicant qualifies for a provisional enrollment for one

- ☐ Has received at least one dose of each of the required vaccines but has not completed all the required immunizations or;
- ☐ Is a transfer student from another school system. (A transfer student is an applicant seeking enrollment from one U.S. domestic elementary or secondary school to another)

The amount of time allowed for provisional enrollment shall be as rapidly as medically feasible but shall not exceed 60 calendar days. The period of provisional enrollment shall begin on the date the certificate is signed. To be valid, the certificate shall be completed in its entirety including an expiration date and list of remaining vaccines required to qualify for a Certificate of Immunization:

Certificate Expiration Date: ______

Remaining vaccine(s) required:

______

______

I certify that the above named applicant is hereby issued a Provisional Certificate of Immunization and I have informed the applicant, parent, or guardian of the provisional enrollment requirements.

Signature: ______
Physician (MD or DO), Physician Assistant, Nurse, or Certified Medical Assistant

Date: ______

Record of Immunization

	Vaccine	Date Given	Doctor / Clinic / Source
Diphtheria, Tetanus, Pertussis DTaP/DTP/DT/ Td/Tdap	1 Tdap	05/15/2011	IRISINV
	2 DTaP	04/09/2012	IR Physicians
	3 DTaP,5 pertussis	05/07/2012	Iowa Immunization Program
	4		
	5		
	6		
Polio IPV/OPV	1		
	2		
	3		
	4		
Measles, Mumps, Rubella MMR	1 MMRV	04/09/2012	IR Physicians
	2		
***Haemophilus influenzae* type b**	1 Hib-PRP-T	02/15/2012	IR Physicians
	2 Hib-PRP-T	03/09/2012	IRISINV
	3 HepB-Hib	05/07/2012	Iowa Immunization Program
	4		
Hepatitis B	1 HepB-Hib	05/07/2012	Iowa Immunization Program
	2		
	3		
	4		
Varicella If applicant has a history of natural disease write, "Immune to Varicella"	1 MMRV	04/09/2012	IR Physicians
	2		
Pneumococcal PCV	1		
	2		
	3		
	4		

April 2012

Certificate of Immunization

This certificate is the official Certificate of Immunization required for children entering licensed child care and school in the state of Iowa.

IDPH

Iowa Department of Public Health
Certificate of Immunization

Name Last: DEAN First: BRONSON Middle: ________ Date of Birth: 05/18/2007

Parent/Guardian ________ Address: 53527 Phone: ________

I certify that the above named applicant has a record of age-appropriate immunizations that meet the requirement for licensed child care or school enrollment.

Signature: ________________ Date: ________

Physician, Physician Assistant, Nurse, or Certified Medical Assistant

A representative of the local Board of Health or Iowa Department of Public Health may review this certificate for survey purposes.

	Vaccine	Date Given	Doctor / Clinic / Source
Diphtheria, Tetanus, Pertussis DTaP/DTP/DT/ Td/Tdap	Tdap	05/15/2011	IRISINV
	DTaP	04/09/2012	IR Physicians
	DTaP,5 pertussis	05/07/2012	Iowa Immunization Program
Polio IPV/OPV			
Measles, Mumps, Rubella MMR	MMRV	04/09/2012	IR Physicians
***Haemophilus influenzae* type b** Hib	Hib-PRP-T	02/15/2012	IR Physicians
	Hib-PRP-T	03/09/2012	IRISINV
	HepB-Hib	05/07/2012	Iowa Immunization Program
Hepatitis B	HepB-Hib	05/07/2012	Iowa Immunization Program

	Vaccine	Date Given	Doctor / Clinic / Source
Varicella Chicken Pox *If applicant has a history of natural disease write "Immune to Varicella"*	MMRV	04/09/2012	IR Physicians
Pneumococcal PCV/PPV			
Meningococcal MCV4/MPSV4			
Hepatitis A			
Rotavirus			
Human Papilloma Virus HPV			
Other			

April 2012

Master Index Card

This is an internal document for health care providers in Iowa to maintain a patient's immunizations.

Iowa Department of Public Health - Bureau of Disease Prevention and Immunization
Master Index Card

Patient's Name: BAYER, BRITTANY WANDA　S.S. #: ____　Date of Birth: 01/30/2010　Gender: F

Parent/Guardian: ____　Home Ph: ____　Birth State/Country: ____

Address: 447 PICKNEY ROCK RAPIDS , IA 50258　Work Ph: ____　Mother's Maiden Name: BRINDEL

Ethnicity: ____　Medicaid #: ____　Mother's S.S. #: ____

Race: ( ) American Indian/Alaska Native ( )Asian ( )Black ( )Native Hawaiian or Other Pacific Islander ( )White　Physician: ____

Medical Notes/Allergies: ____

This child qualifies for the VFC program because he/she is (select only one): ( )M-Medicaid Enrolled ( )NI-Has No Insurance ( )AI/AN-Am. Ind/AK Native ( )UI-Underinsured

*I have read and understand the appropriate Vaccine Information Statement(s). I have had a chance to ask questions which were answered to my satisfaction. I understand the benefits and risks of the vaccine(s).

Vaccine	Date Given	Client / Parent / Guardian Signature *	Health Care Provider	Dosage / Route / Site	Manufacturer / Lot #	VIS Form & Date
Diphtheria, Tetanus, Pertussis *DTaP/Tdap/DTP/DT/Td*						
Polio	*IPV/OPV*					
Polio-Inject	04/26/2010			1		
Polio-Inject	07/06/2010			1		
Polio-Inject	01/05/2011			1		
Measles, Mumps, Rubella	*MMR*					
MMR	03/15/2011			1		
MMR	05/10/2011			1		
Haemophilus influenzae type b *Hib*						
Hib-OMP	04/12/2010			1		
Hib-OMP	05/23/2010			1		
Hib-OMP	07/26/2010			1		
Hib-OMP	02/11/2011			1		
Hepatitus B						
HepB-Peds	04/13/2010			1		
HepB-Peds	06/10/2010			1		
HepB-Peds	08/23/2010			1		

03/06/2012　Page 1 of 2　Revision date: June, 2012

Patient Reminder Letter

The Patient Reminder Letter prints an individual patient's reminder letter, which includes the patient vaccination record and the recommended vaccines to be received. This report generates in PDF format, which can then be printed for the specific patient.

Dear Parent/Guardian of Brittany Wanda Bayer,

Our records indicate that Brittany Wanda Bayer, has received the following immunizations:

Immunization Record	Tracking Schedule	ACIP
Immunization	**Date Administered**	**Series**
HepB	04/13/2010	1 of 3
	06/10/2010	2 of 3
	08/23/2010	3 of 3
Hib	04/12/2010	1 of 4
	05/23/2010	2 of 4
	07/26/2010	3 of 4
	02/11/2011	4 of 4
MMR	03/15/2011	1 of 2
	05/10/2011	2 of 2
Polio	04/26/2010	1 of 4
	07/06/2010	2 of 4
	01/05/2011	3 of 4
Varicella	05/30/2011	Not Valid

Our records also show that Brittany may be due for the following immunizations. If Brittany received these or other immunizations from another health care provider, please call our office so that we can update Brittany's record. Otherwise please take Brittany to a health care provider to receive them.

Immunizations Due
DTaP, NOS
HepA, NOS
Varicella
Influenza, NOS
PCV13

Ad Hoc Reports

The Ad Hoc reports function in IRIS allows the user to create one time use customized reports. Filters within the Ad Hoc reporting function help to narrow a search by date, vaccine group, ethnicity, and other factors. The Ad Hoc reporting function produces two types of reports; one type produces lists with information about selected patients, the other type produces counts, either of patients or of immunizations. The table below defines terms used in Ad Hoc reports.

Patient Factors	Item Name	Description
	Active relationship to an organization	Whether the patient has an active status for an organization
	American Indian or Alaska Native	Whether the patient is an American Indian or Alaska Native
	Area Code	Area Code in which the
	Asian	Whether the patient is Asian
	Birth County	County of birth
	Birth Date	Date of birth
	Black or African-American	Whether the patient is Black or African-American
	City	Current city in which the patient resides
	Comment	Any comments associated with the patient record
	Consent Indicator	Consent of the patient
	County of Residence	Current county in which the patient resides
	Ethnicity	Ethnicity of patient
	Gender	Gender of patient
	Has 2 or more immunizations	Whether the patient has two or more immunizations
	Language preferences	Language preferred by the patient
	Native Hawaiian or Other Pacific Islander	Whether the patient is Native Hawaiian or an Other Pacific Islander
	Other Race	Whether the patient is of

		a race not specified by the system, leading them to choose Other
	Patient ID	The Patient ID within IRIS
	Phone number	Current phone number
	Primary Address Indicator	Whether the patient has a primary address on file in IRIS
	Primary Care physician	Patient's primary care physician
	Relationship to patient	The Responsible Person's relationship to the patient
	School	Current school the patient attends
	State	Current state of residence
	White	Whether the patient is White/Caucasian
	Zip code	Zip Code in which the patient current resides
Immunization Factors	**Item Name**	**Description**
	Administering clinician	Clinician who administered the immunization
	Clinic site	Clinic site at which the immunization was administered
	Display Inadvertent Vaccine Group	
	From Inventory	Whether the immunization was from inventory in IRIS
	Trade Name	Vaccine's trade name
	Vaccination date	Date on which the immunization was administered
	Vaccine	Vaccine administered
	Vaccine Eligibility	Whether the immunization was Vaccines for Children (VFC) eligible
	Vaccine Funding Source	Whether the

		immunization is from PUBLIC or PRIVATE lot
	Vaccine Lot Other Inv	
	Vaccine Group	Group in which the vaccine is labeled
	Vaccine Lot	The lot from which the vaccine was administered
	Valid immunization	Whether the immunization is valid
Comparison	BEFORE	Used for dates
	EQUALS	Same in comparison
	NOT EQUAL TO	Not the same in comparison
	AFTER	Used for dates
	BETWEEN	Used for dates
	IS	Exact equivalent
	IS NOT	Not the equivalent
Selected Filters	Edit	Edit an applied filter
	Remove	Remove an applied filter
	And/Or	Changes the operator between 'And' and 'Or' depending upon which is initially selected. Requires at least two filters to be applied.
	Group	Groups filtered sections together in the report
	Ungroup	Removes grouped filtered sections

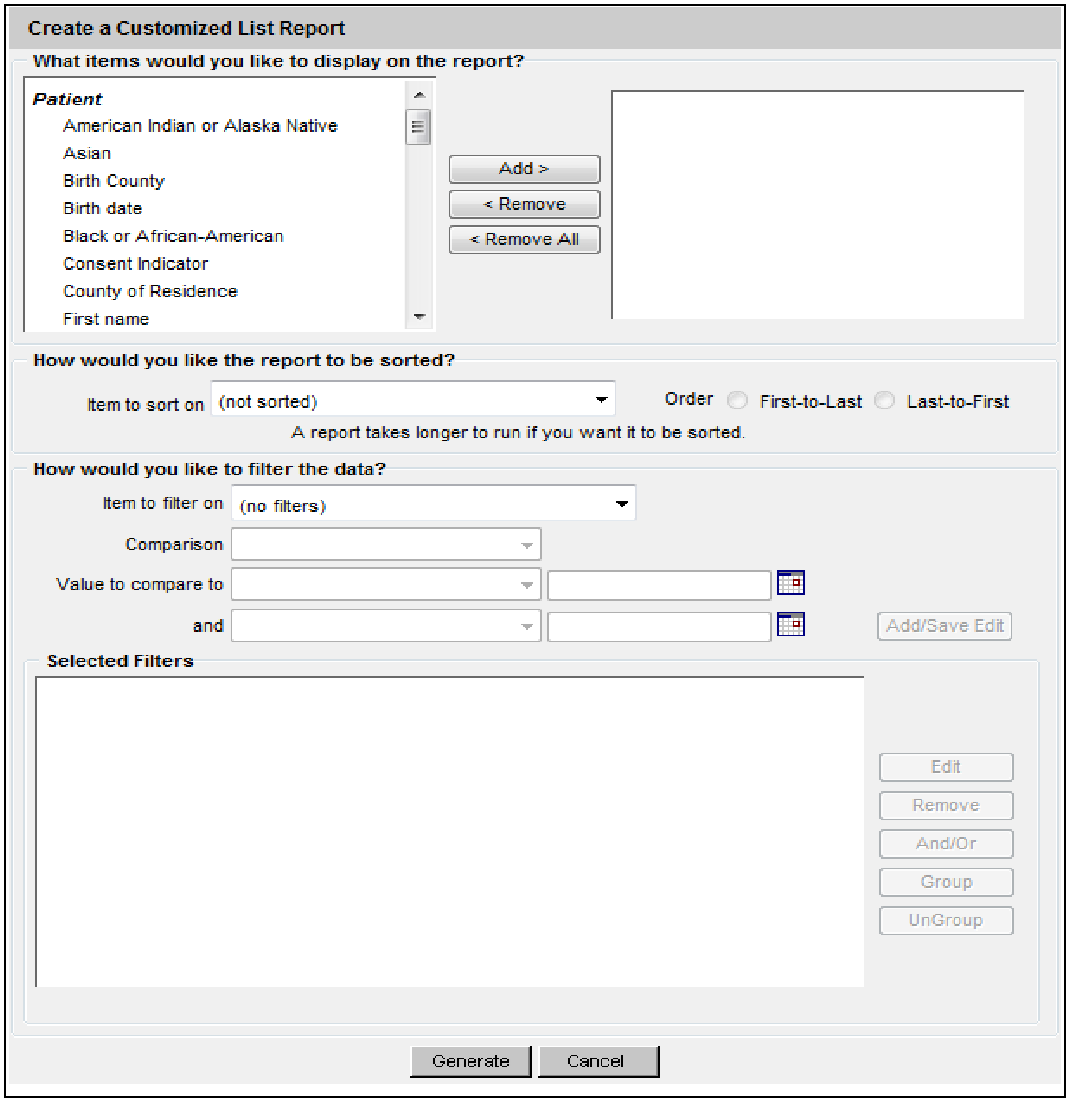
Notes: Patients whose information is added or changed on the day the report is run will not appear in the results until the following day.

Ad Hoc reports run against all patients associated with your organization. To disassociate a patient from your organization you must change their status to inactive in the organization information section of the patient's record.

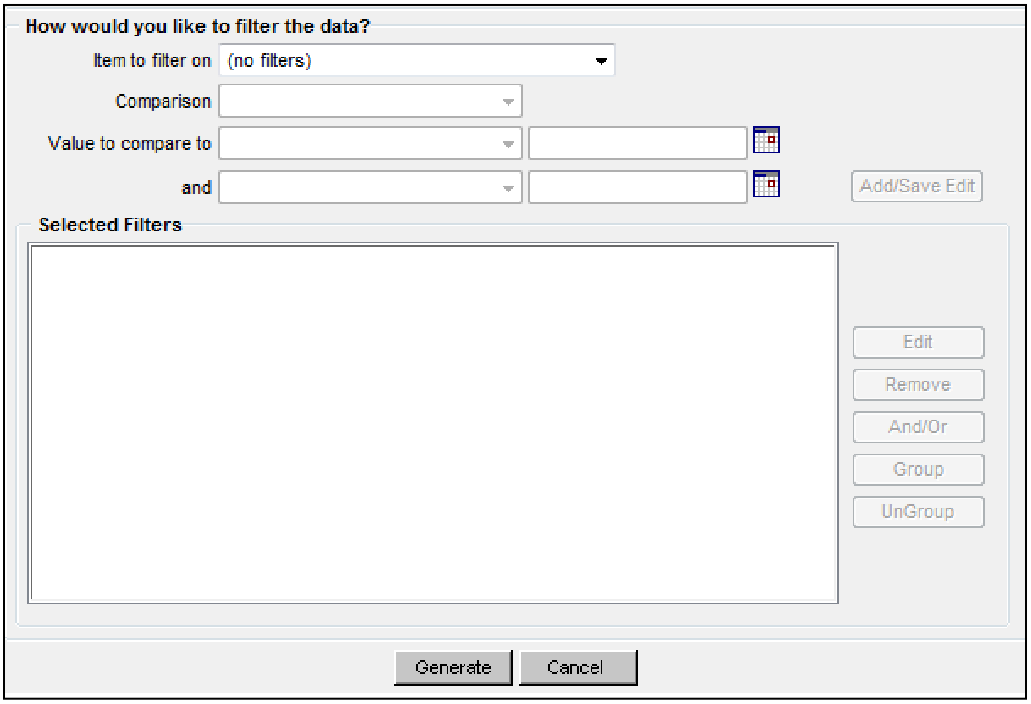
Ad Hoc List Reports

To produce a list of information about selected patients:

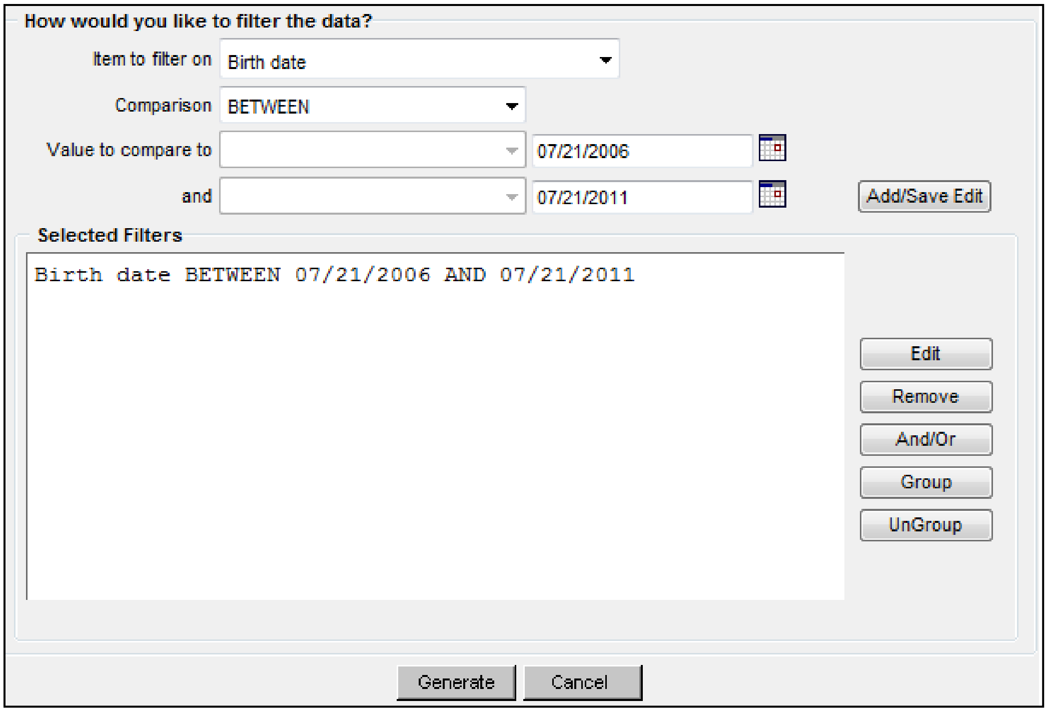
1. Click **Ad Hoc List Report** under the Reports section of the menu panel.
2. Select the items that you would like to display on the report by double-clicking the desired items from the left column (for example, Patient Last Name) or by highlighting the item and clicking **Add**. This will copy the item to the right column and add it to your report.



3. Select the single item by which you would like to have the report sorted and click the sort order (first-to-last or last-to-first). Note: Sorting the report will increase the time it takes to process it.



4. Under Item to filter on, select an item that you would like to add as a filter using the drop down list. For example, Birth Date Range could be an item used as a filter.
5. Filters in IRIS are used to narrow information down so that it answers a user's query. Under Comparison, select a word from the drop down list that best describes the type of comparison you wish to make; for example, Between. =
6. Under Value to compare to, either choose a value from the drop down list in the left field and/or enter a date in the right field.
7. Under And, select another value from the drop down list in the left field or enter the ending date in the right field, if applicable.
8. Click the **Add/Save Edit** button. Repeat steps 4-8 for each item you wish to filter.

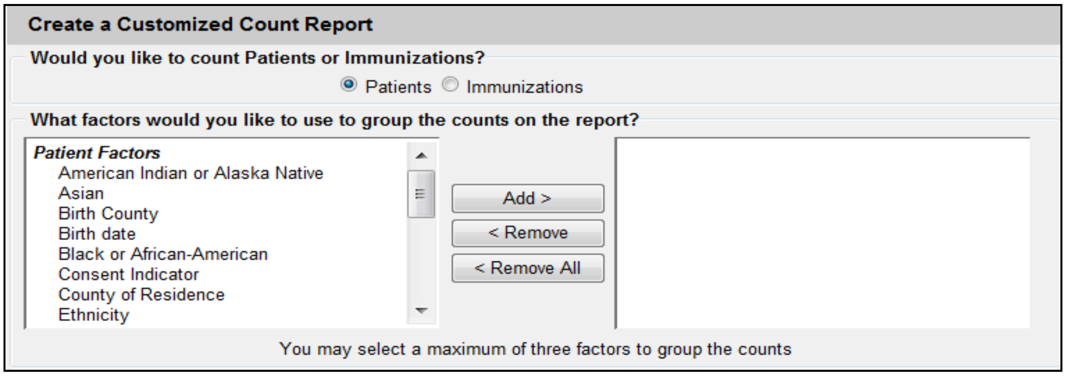


9. When finished adding filter items:
    a. Within the Selected Filters section, to change AND to OR, highlight 'AND' and click the **'And/Or'** button. Alternatively, can also be switched to AND by following the same process.
    b. Group them together by highlighting two filter statements and clicking the **Group** button. This groups the filters together in the report.
    c. Highlight a grouped statement and click the **Ungroup** button to ungroup it. This removes the filters from being grouped together in the report.
    d. Highlight a statement and click the **Remove** button to remove it from the selected filters.
    e. Highlight a statement and click the **Edit** button to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and click the **Add/Save Edit** button.
10. Click the **Generate** button. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

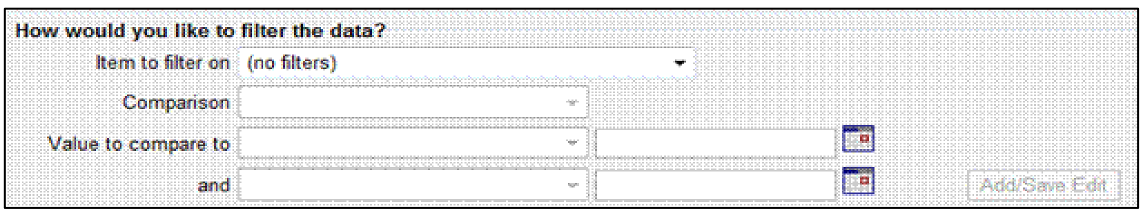
Ad Hoc Count Report

To produce a count of selected patients or immunizations:

1. Click **Ad Hoc Count Report** under the Reports section of the menu panel.
2. Select whether Patients or Immunizations will be counted by clicking the appropriate radio button at the top of the screen.



3. Select the factors you would like to use to group the counts on the report by double-clicking on the desired item from the left column (for example, Vaccine Group) or by highlighting the item and clicking the **Add** button. This will copy the item to the right column so that it can be used in your report. You can choose a maximum of three factors.



4. Under Item to filter on select an item that you would like to add as a filter using the drop down list. For example, Birth Date Range could be an item used as a filter.
5. Under Comparison, select a word from the drop down list that best describes the type of comparison you wish to make. For example, between is one comparison operator.
6. Under Value to compare to, either choose a value from the drop down list in the left field or enter a beginning date in the right field.
7. Under and, select another value from the drop down list in the left field or enter the ending date in the right field, if applicable.
8. Click on **Add/Save**. Repeat Steps 4-8 for each item you wish to filter.
9. When finished adding filter items, you may do the following:
    a. Group them together by highlighting two filter statements and click Group.
    b. Change AND to OR by highlighting ‘AND’ and clicking the ***And/Or*** button. OR can also be switched to AND by following the same process.
    c. Highlight a grouped statement and click on ***Ungroup*** to ungroup it.
    d. Highlight a statement and click on ***Remove*** to remove it from the selected filters.
    e. Highlight a statement and click on ***Edit*** to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and click on ***Add/Save***
10. Click **Generate**. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

Ad Hoc Report Status

1. The Ad Hoc Report Status screen will display after you click **Generate** on the Ad Hoc Count or Ad Hoc List Report screens. You may also access the status screen by clicking on Ad Hoc Report Status under the Reports section of the menu panel.

Ad Hoc Report Status Refresh Cancel

Report Type	Started	Completed	Status	Row Count
COUNT	07/21/2011 10:32 AM		PROCESSING	0

Ad Hoc Report Status Refresh Cancel

Report Type	Started	Completed	Status	Row Count
COUNT	07/21/2011 10:32 AM	07/21/2011 10:32 AM	DONE	10

Ad Hoc Report Status Refresh Cancel

Report Type	Started	Completed	Status	Row Count
COUNT	07/21/2011 10:32 AM	07/21/2011 10:32 AM	DONE	10
LIST	07/21/2011 10:33 AM		PROCESSING	0

Ad Hoc Report Status Refresh Cancel

Report Type	Started	Completed	Status	Row Count
COUNT	07/21/2011 10:32 AM	07/21/2011 10:32 AM	DONE	10
LIST	07/21/2011 10:33 AM	07/21/2011 10:33 AM	DONE	54

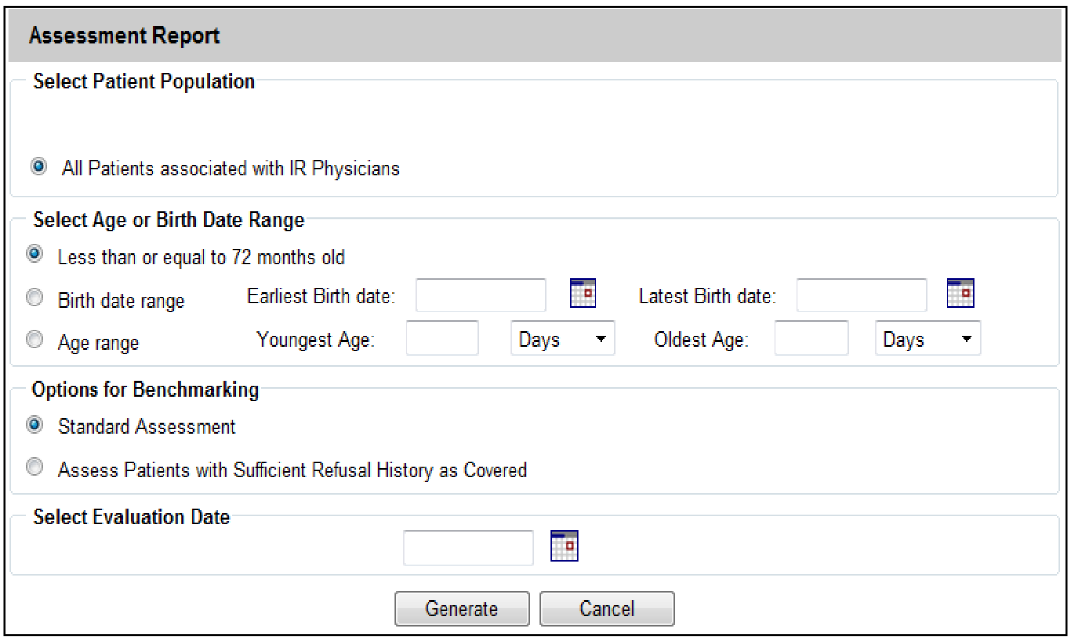
2. Click **Refresh** occasionally to check the status of the report. Once the underlined report type appears in blue, click it. The report will display directly on this screen.
3. Export the data as a text file, spreadsheet, or PDF by selecting the appropriate link.
4. If you wish to print the report, click **Print** under the **File** menu within the application (text file, spreadsheet, or Adobe® Reader). In the print dialog box, adjust the print options as necessary, and then click either **Print** or **OK**, depending on the application.

Note: Ad hoc reports are retained for 72 hours per organization. IRIS will retain one count report and one list report for that period. If a new report of the same type is generated, the new report will replace the existing report.

Assessment Reports

The Assessment Report feature in IRIS provides an analysis of an organization's immunization coverage rates. The following is a brief overview of the data that are returned on each table within the Assessment Report. Routinely reviewing patient records and assessing vaccination coverage rates are proven strategies to improve vaccination coverage in your organization.

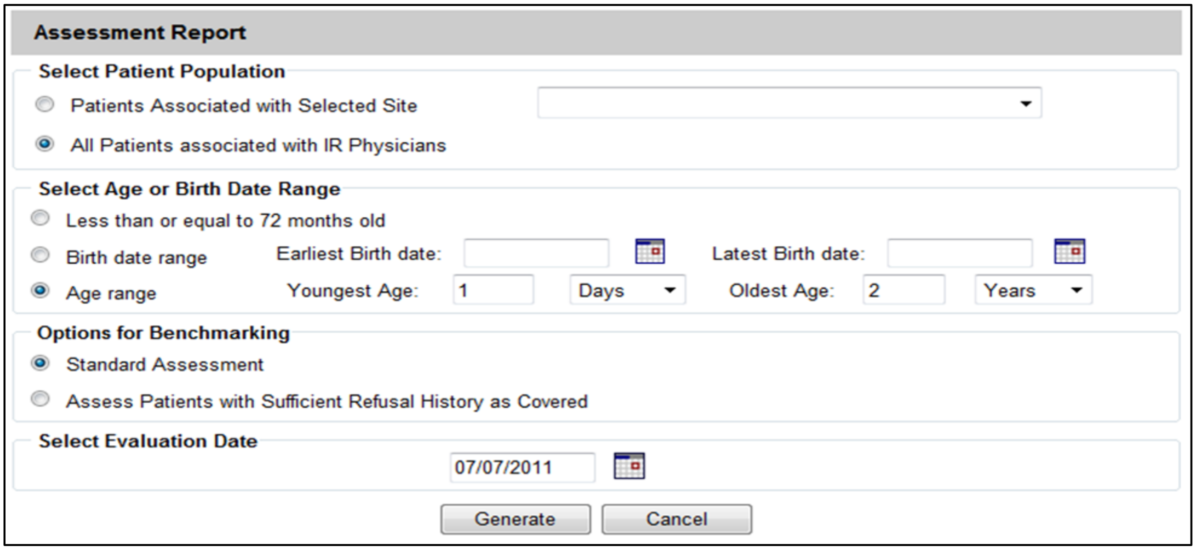
1. Click **Assessment Report** under the Reports section of the menu panel.



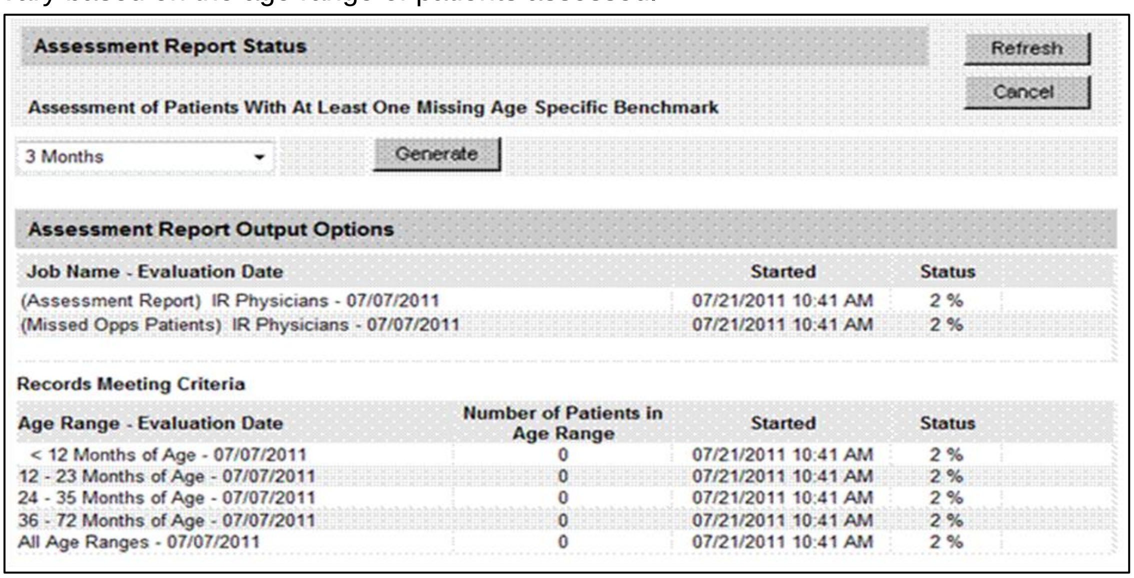
2. Select the patient population to be assessed by clicking one of the following:
3. All Patients Associated with <Organization Name>: Choose this option to view immunization data on all patients associated with your organization.
4. Select the age, birth date range, or age range of the patients by choosing one of the following:
    a. Less than 72 months old: Choose this option to return all patients who are 72 months or younger.
    b. Birth date range: Choose this option to enter a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field. Alternatively, use the calendar icons beside each field to enter the dates.
    c. Age range: Choose this option to enter an age range. Enter the youngest age range in the first field; use the drop down list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the drop down list to choose days, months, or years. You cannot search for patients older than 72 months.
    d. Select either the Standard Assessment or the Assess Patients with Sufficient Refusal history as Covered option for the report by choosing the appropriate

radio button. Selecting the second option will return an assessment report that counts patients with sufficient refusal comments as being up-to-date.

5. Select the assessment report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the assessment criteria date will be included in the report.



6. Click **Generate.**
7. The Assessment Report Status screen will display. Some reports will automatically generate and will appear in the Job Name – Evaluation Date and Age Range – Evaluation Date Sections. The number of reports that will automatically generate will vary based on the age range of patients assessed.



8. Click **Refresh** occasionally to check on the progress of the reports. When the reports are ready, the job name will appear underlined and in blue text and the status will display as Complete.
9. Once reports are complete, you may view the reports that automatically generated, or you may run additional reports. At this screen you may do the following:

10. Select an age from the drop down list provided and click on Generate (to the right of the age drop down list). Create an assessment report listing patients for an age-specific benchmark by selecting an age from the drop down list and clicking **Generate**. This report lists the patient's name, address, telephone number, and the vaccinations that they did or did not complete or refused by the benchmark age. A patient will show on the report if they missed at least one age-specific benchmark.
11. Click the underlined job name.
12. The report listing patients by benchmark age will have a job name of: (Benchmark Patient Listing) <Organization Name> - <Benchmark Age>.
13. The assessment report will be called: (Assessment Report)<Organization Name> - <Date>.
14. A report listing all patients who have missed a vaccination opportunity will have a job name of: *(*Missed Opps Patients)<Organization Name>-<Date>.
15. Click an underlined age range to view a listing of patients returned that fall within the specified range. This list will give the name, address, and telephone number for all patients meeting the record criteria. To view patients for all age ranges that meet the criteria, click the All Age Ranges link.
16. The report displays in Adobe Reader® if you clicked one of the report or age range links. To print one of the reports, click on the printer icon on the Adobe® toolbar.
17. Click **OK** in the Print Dialog box.
18. To return to the Assessment Report Status screen, click the Back button in the browser.

Note: Patients with Refusals
If the option to Assess Patients with Sufficient Refusal History as Covered is selected when the assessment report is run, patients who fall short of needed, valid doses but have sufficient refusals to meet the benchmark are included within the count as if they received the needed doses.

Understanding the Assessment Report

The following is a brief overview of the data that is returned on each table within the assessment report.

Table 1

Age Group	Records Analyzed	Inactive	Records Meeting Criteria
36 -72 Months of Age	50	0	50
24 - 35 Months of Age	51	0	51
12 -23 Months of Age	54	0	54
< 12 Months of Age	46	0	46
Total	201	0	201

Age Group: This column displays the age ranges used for evaluation.

Records Analyzed: This column displays the count of selected patients within the age group that are included in this report. This is determined by the age range chosen when generating the report.

Inactive: This column displays the count of selected patients within the age group that are not active in your clinic. Refer to Chapter 10, Managing Patients, for information on marking patients as inactive.

Records Meeting Criteria: This column displays the count of selected patients within the age group who are Active in your organization.

Table 2

Immunization Status		
Age(months)	Up-to-Date [1-4] (UTD)	Late [1-4]
36 - 72 Months of Age		
72	82.0%	82.0%
24	88.0%	88.0%
12	92.0%	98.0%
7	92.0%	98.0%
24 - 35 Months of Age		
24	80.4%	90.2%
12	78.4%	94.1%
7	76.5%	94.1%
12 - 23 Months of Age		
12	90.7%	92.6%
7	83.3%	92.6%
< 12 Months of Age		
7	89.1%	89.1%

1) UTD by 7 months equals 3 DtaP, 2 HepB, 2 HIB, 2 Polio
2) UTD by 12 months equals 3 DTaP, 2 HepB, 2 HIB, 2 Polio.
3) UTD by 24 months equals 4 DTaP, 3 HepB, 3 HIB, 1 MMR, 3 Polio, 1 Varicella.
4) UTD by 72 months equals 5 DtaP, 3 HepB, 4 HIB, 2 MMR, 4 Polio, 1 Varicella.
Late UTD equals the same benchmark for the age group, but it is assessed on the date the report was run.

Age (Months): This column displays the age of the patient on the assessment date.

Up-to-Date: This column displays the percent of patients (out of the total number of active patients for that age group) meeting the criteria on the assessment date. The criteria are given at the bottom of the report page. For example, a seven-month-old UP-TO-DATE patient who has met the criteria will have had three DTaP, two HepB, two HIB, and two Polio vaccinations.

Late UP-TO-DATE

@ Assessment: This column displays the percent of patients (out of the total number of active patients for that age group) meeting the criteria on the date the report was run, rather than on the assessment date.

Table 3

Age Specific Immunizations Benchmarks							
UTD Grid	DTap	Hep B	Hib	MMR	Polio	Prevnar	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1

The Age-Specific Immunization Benchmarks chart shows how many doses of each vaccine a patient should have by the age listed at the left to be determined UP-TO-DATE. This chart is used to create the Assessment of Patients Meeting Age-Specific Benchmarks table.

Table 4

Assessment of Patients Meeting Age Specific Benchmarks									
UTD Age	DTap	Hep B	Hib	MMR	Polio	Prevnar	Varicella	Total Meeting Age Criteria	% Coverage
3 Months	183	184	187		178	40		201	17.4%
5 Months	180	182	180		175	42		201	17.9%
7 Months	175	184	189		181	42		201	19.4%
9 Months	179	184	190		181	42		201	19.4%
12 Months	136	143	148		141	42		155	25.2%
16 Months	103	93	137	118	97	19	116	149	.7%
19 Months	103	95	137	121	101	25	119	149	.7%
21 Months	127	123	137	131	105	39	128	147	4.1%
24 Months	89	90	92	95	95	42	94	101	40.6%
72 Months	46	45	47	44	45	0	49	50	.0%

UP-TO-DATE Age: This column shows the maximum age the patient has attained by the assessment date.

Vaccine Columns: These seven columns display the count of the patients who have met the vaccination criteria by the UP-TO-DATE age.

Total Meeting Age Criteria: This column gives a count of all the patients who are at least the age listed under UP-TO-DATE Age. However, the 72 Months UP-TO-DATE Age category includes patients from 48 to 72 months of age.

% Coverage: This column displays the percentage of patients meeting all UP-TO-DATE criteria, out of a total of all patients at least the age listed under UP-TO-DATE Age.

Table 5

Children Who Could Have Been Brought Up-To-Date With Additional Immunizations		
<= 12 Months of Age	5	10.9%
1 Vaccine Needed	2	40.0%
2 Vaccines Needed	3	60.0%
3 Vaccines Needed	0	.0%
4 Vaccines Needed	0	.0%

The report breaks down the children who could have been brought up to date into three tables,≤ 12 months, 24-36 months, and 60-72 months. This is an example of ≤ 12 months.

Column 1: In the first row of column one, the age range of patients examined in this table is displayed. In subsequent rows within this column, the number of vaccines needed by this group of patients is displayed.

Column 2: In the first row of column two, a count is displayed of all patients for this age group who are behind schedule for four or fewer vaccinations. Subsequent boxes display a count of patients for this age group who need additional vaccinations to be up-to-date.

Column 3: In the first row of column three, a percent is displayed of all patients for this age group who are behind schedule for four or fewer vaccinations (out of the total number of patients for this age group). Subsequent rows within this column display a percentage of patients for this age group who need additional vaccinations to be up-to-date.

Table 6

Children Who Got A Late Start or Have Dropped Off Schedule After A Good Start			
Late Start Rates	Beginning > 3 mo. age [1]	100.0%	36-72 mo. age group
		21.6%	24-35 mo. age group
		98.1%	12-23 mo. age group
Drop Off Rates	60-72	.0%	24 month status
	48-59	.0%	24 month status
	36-47		24 month status
	24-35 mo. age	.0%	24 month status
	12-23 mo. age	5.6%	12 month status

Late Start Rates: A patient who did not receive one full dose of DTaP by 90 days of age is considered to have gotten a late start. The values in column three of the late start row are the percentages of patients (within the age groups listed in column four) who have not received the first DTaP dose by 3 months of age.

Drop Off Rates: The drop off rate section of this chart shows the percentage of patients (column three) in various age groups (column two) who have not gone beyond 12 or 24-month status (column four) in their immunizations. Immunization status is calculated using the formula outlined at the bottom of the chart.

Table 7

Patients Who Do Not Have a Birth Dose of HepB and Have Not Completed the 3 Dose Series		
	Number [4]	Per Cent [5]
Patients Missing Birth Dose Of Hep	14	7.0%

The Hep B chart gives the number and percentage of patients who did not receive a birth dose of the Hep B vaccination and who did not complete the three-dose series. Patients evaluated are between six and 72 months old and have at least one immunization in IRIS.

Table 8

Missed Opportunity Assessment

Age Group on Evaluation Date	Total Patients in Age Group	Patients Not up to Date		Missed Opportunity on Last Visit	
		Count	Percent	Count	Percent
<12 months 7 month benchmark	6	5	83.3%	1	16.7%
12-23 months 12 month benchmark	20	16	80.0%	14	70.0%
24-35 months 24 month benchmark					
36-72 months 24 month benchmark					

Age Group on Evaluation Date: This column lists the age group of the selected patients and the immunization benchmark used for evaluation.

Total Patients in Age Group: This column gives the total number of patients within the age group listed in the first column.

Patients Not Up to Date: This column gives the count and percentage of patients who are not up to date for the benchmark listed in column one.

Missed Op on Last Visit: This column gives the count and percentage of patients who are ***not*** up to date ***and*** who had a missed opportunity for vaccination on the last visit on or before the evaluation date.

The missed opportunities report lists all your organization's patients who have missed opportunities to be vaccinated. This report lists the patient's first and last names, birth date, and date of each missed opportunity by vaccine group.

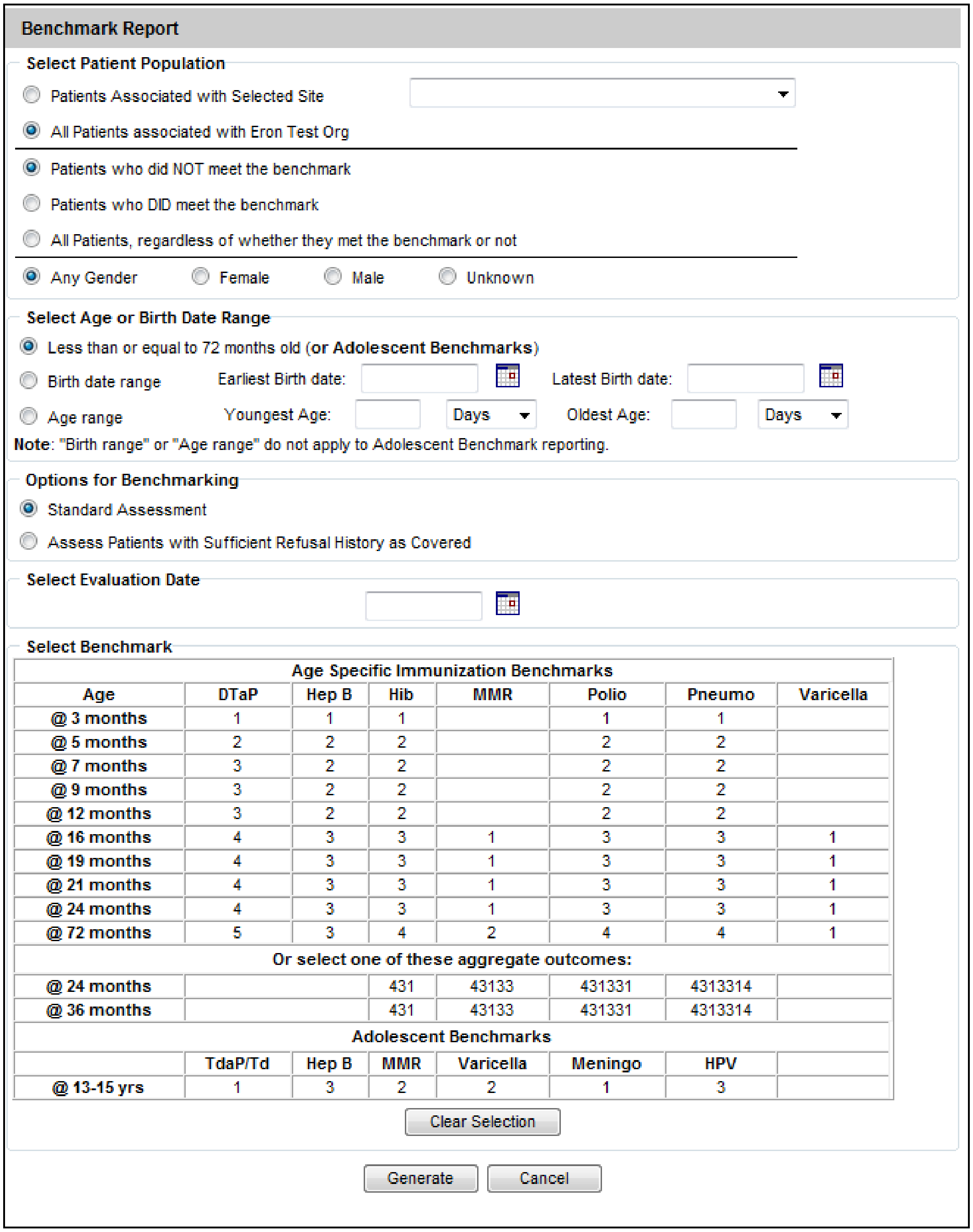
Note: Missed Opportunities Assessment
Keep in mind, since IRIS is used for reporting immunization records, it only identifies patients that had at least one immunization at their last visit, but missed an opportunity to receive additional immunizations. The Missed Opportunities Assessment in IRIS will not include any patients that were treated at your organization for any other reason except vaccination purposes.

Benchmark Reports

Benchmark reports allow IRIS users to retrieve a list and count of patients who have met an immunization benchmark or predefined series of benchmarks. The resulting report may be viewed in IRIS, exported as a text file, exported as a spreadsheet, or exported as a PDF file.

To generate a Benchmark report:

1. Click **Benchmark Report** under the Reports section of the menu panel.



Benchmark Report

Select Patient Population

- Patients Associated with Selected Site
- All Patients associated with Eron Test Org

- Patients who did NOT meet the benchmark
- Patients who DID meet the benchmark
- All Patients, regardless of whether they met the benchmark or not

Any Gender   Female   Male   Unknown

Select Age or Birth Date Range

- Less than or equal to 72 months old (**or Adolescent Benchmarks**)
- Birth date range   Earliest Birth date: Latest Birth date:
- Age range   Youngest Age: Days   Oldest Age: Days

Note: "Birth range" or "Age range" do not apply to Adolescent Benchmark reporting.

Options for Benchmarking

- Standard Assessment
- Assess Patients with Sufficient Refusal History as Covered

Select Evaluation Date

Select Benchmark

Age Specific Immunization Benchmarks							
Age	**DTaP**	**Hep B**	**Hib**	**MMR**	**Polio**	**Pneumo**	**Varicella**
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1
Or select one of these aggregate outcomes:							
@ 24 months			431	43133	431331	4313314	
@ 36 months			431	43133	431331	4313314	
Adolescent Benchmarks							
	TdaP/Td	**Hep B**	**MMR**	**Varicella**	**Meningo**	**HPV**	
@ 13-15 yrs	1	3	2	2	1	3	

Clear Selection

Generate   Cancel

2. Select the patient population to be assessed by clicking on one of the following:
    a. Patients Associated with Selected Site: immunization data on all patients associated with the site selected from the drop down list at the right. Patients Associated with <Organization Name> OR Patients Residing in < County Name>: immunization data on patients associated with your organization and those residing within a given county. This option is only available for county organizations. (City organization functionality has been disabled in IRIS.)
    b. All Patients Associated with <Organization Name>: immunization data on all patients associated with your organization.
3. Click one of the following to specify the patients to return on the report:
    a. Patients who did NOT meet the benchmark: a list of patients who did not meet the benchmark(s) defined in the table.
    b. Patients who DID meet the benchmark: a list of patients who met the benchmark(s) defined in the table.
    c. All patients, regardless of whether they met the benchmark or not: a list of all patients meeting the criteria defined in the table.
    d. Select gender of patients to be assessed (the default is set to Any Gender).
4. Select the age, birth date range, or age range of the patients by choosing one of the following. You may only enter up to age six years.
    a. Less than or equal to 72 months old: all patients who are 72 months old or younger.
    b. Birth date range: a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field that you wish included on the report or use the calendar icons beside each field to enter the dates.
    c. Age range: an age range. In the Youngest Age field, use the drop down list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the drop down list to choose days, months, or years.

Note: Select Age or Birth Date Range
The Age Range and Birth Date Range options do not apply to the Adolescent benchmark reporting. Users can disregard these fields when reporting on Adolescent benchmarks.

5. Select either the Standard Assessment or the Assess Patients with Sufficient Refusal History as Covered option for the report by choosing the appropriate radio button. Selecting the second option will return a benchmark report that counts patients with sufficient refusal comments as being up-to-date.

Note: Refusals of Vaccine
In order for patient refusals of vaccine to be calculated correctly on assessment and benchmark reports, an appropriate Start Date must be entered for refusal comments on the Patient Comments tab. Refer to the Managing Patients Chapter 10 of this manual for more information.

6. Select the report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the evaluation date will be included in the report.
7. Select the benchmark(s) to be used on the report:
8. To select one or more single vaccine benchmarks within a single row, click on the box where the vaccine and the number of months intersect. For example, clicking on the box with 4 in it where DTaP and @ 19 months intersect will result in a report with this benchmark included.
9. To select all benchmarks in a row, you may click on the first box in the row that indicates @ X months.

Select Benchmark

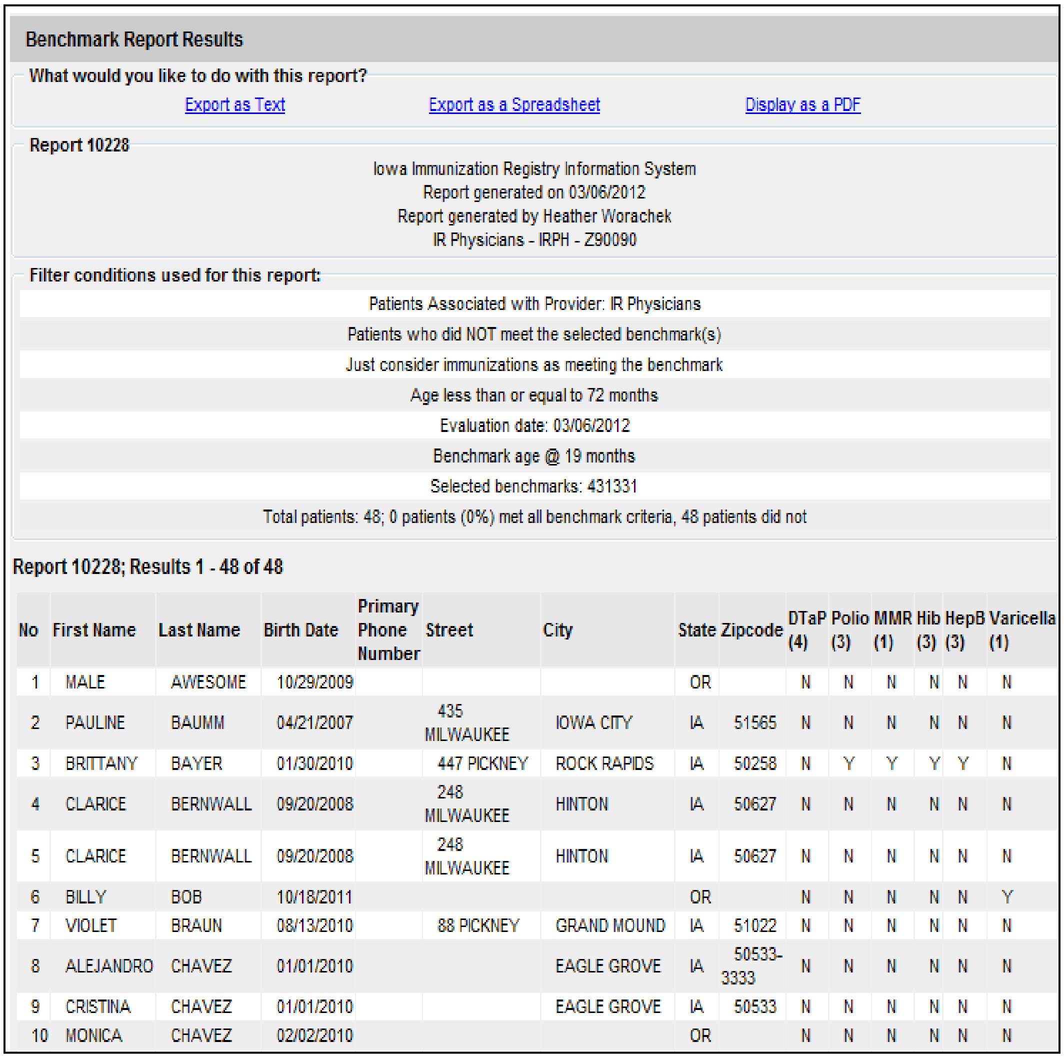
Age Specific Immunization Benchmarks							
Age	DTaP	Hep B	Hib	MMR	Polio	Pneumo	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1
Or select one of these aggregate outcomes:							
@ 24 months			431	43133	431331	4313314	
@ 36 months			431	43133	431331	4313314	
Adolescent Benchmarks							
	TdaP/Td	Hep B	MMR	Varicella	Meningo	HPV	
@ 13-15 yrs	1	3	2	2	1	3	

Clear Selection

Generate Cancel

10. To select benchmarks in a predefined series, select the 431, 43133, 431331 or 4313314 aggregate benchmarks.
11. Click the **Generate** button.
12. The Benchmark Report Status screen will display. Click on Refresh occasionally to check on the progress of the report. When the report is ready, click on the blue Benchmark hyperlink. Once this link is clicked, IRIS will display the Benchmark report at the bottom of the Benchmark Report Status screen. In addition, you may do one of the following:
13. Click the **Export as Text** link to display the report in text file format.

14. Click the **Export as a Spreadsheet** link to display the report in a spreadsheet format.
15. Click the **Display as a PDF** link to display the report in Adobe® Reader.



Benchmark Report Results

What would you like to do with this report?

Export as Text   Export as a Spreadsheet   Display as a PDF

Report 10228

Iowa Immunization Registry Information System
Report generated on 03/06/2012
Report generated by Heather Worachek
IR Physicians - IRPH - Z90090

Filter conditions used for this report:

Patients Associated with Provider: IR Physicians
Patients who did NOT meet the selected benchmark(s)
Just consider immunizations as meeting the benchmark
Age less than or equal to 72 months
Evaluation date: 03/06/2012
Benchmark age @ 19 months
Selected benchmarks: 431331
Total patients: 48; 0 patients (0%) met all benchmark criteria, 48 patients did not

Report 10228; Results 1 - 48 of 48

No	First Name	Last Name	Birth Date	Primary Phone Number	Street	City	State	Zipcode	DTaP (4)	Polio (3)	MMR (1)	Hib (3)	HepB (3)	Varicella (1)
1	MALE	AWESOME	10/29/2009				OR		N	N	N	N	N	N
2	PAULINE	BAUMM	04/21/2007		435 MILWAUKEE	IOWA CITY	IA	51565	N	N	N	N	N	N
3	BRITTANY	BAYER	01/30/2010		447 PICKNEY	ROCK RAPIDS	IA	50258	N	Y	Y	Y	Y	N
4	CLARICE	BERNWALL	09/20/2008		248 MILWAUKEE	HINTON	IA	50627	N	N	N	N	N	N
5	CLARICE	BERNWALL	09/20/2008		248 MILWAUKEE	HINTON	IA	50627	N	N	N	N	N	N
6	BILLY	BOB	10/18/2011				OR		N	N	N	N	N	Y
7	VIOLET	BRAUN	08/13/2010		88 PICKNEY	GRAND MOUND	IA	51022	N	N	N	N	N	N
8	ALEJANDRO	CHAVEZ	01/01/2010			EAGLE GROVE	IA	50533-3333	N	N	N	N	N	N
9	CRISTINA	CHAVEZ	01/01/2010			EAGLE GROVE	IA	50533	N	N	N	N	N	N
10	MONICA	CHAVEZ	02/02/2010				OR		N	N	N	N	N	N

Note: The size of your file is not limited when you choose to export the Benchmark report as text. However, to export as a spreadsheet, there is a limit of 65,535 lines. The information message "file not loaded completely" will display to indicate that part of the report was truncated. When the report is displayed as a PDF, the report will be limited to about 5,000 lines (119 pages); if the report is more than 5,000 lines, a red error report banner will display.

The Benchmark Report shows a list of all patients who met the filter criteria specified when you set up the report. The report gives you a count and percent of how many patients met the specified criteria. It lists patients by first and last name, date of birth, phone number, and address. The Y or N in the columns after each patient's demographic information indicates whether the patient met the criteria for that vaccine and benchmark age.

Doses Administered Report

The Doses Administered Report will give you information on how many doses of each vaccine have been given, by age, within a specified date range. This report includes administered immunization records from IRIS Inventory (historical immunizations are not included). Follow these steps to generate a Doses Administered report for your organization:

1. Click the **Doses Administered** menu item under the Inventory section of the menu panel.
2. At the Doses Administered Report Criteria page, choose your organization from the Site drop down list.
3. In the "From" field under Report Date Range, choose a starting and ending date for your report using the MM/DD/YYYY format.
4. Click the Generate Report button.
5. The report displays in Adobe Acrobat Reader®. Click the printer icon on the Adobe® toolbar to print the report.
6. Click the **OK** button in the Print dialog box.
7. Click your browser's Back button to return to the Doses Administered Report criteria.

Doses Administered Report from IRIS Inventory

Vaccination Period 01/21/2012 To 05/21/2012

Report Run on: 05/21/2012

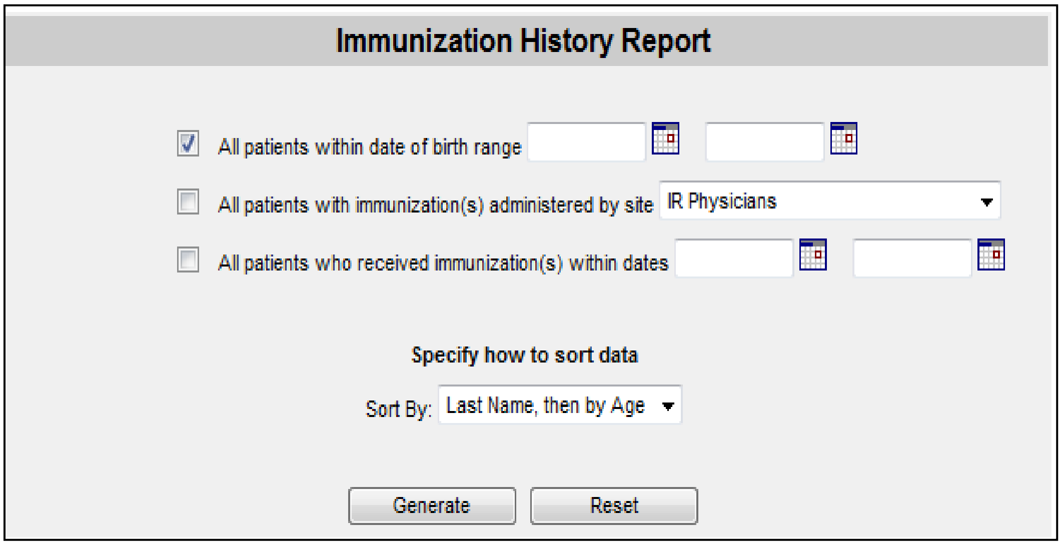
Site: IR Physicians

Group Name	Trade Name	VFC	<1 yr	1 yr	2 yrs	3-5 yrs	6 yrs	7-10 yrs	11-12 yrs	13-18 yrs	19-24 yrs	25-44 yrs	45-64 yrs	65+ yrs	Total
Zoster	Zostavax	Yes	2	1	0	1	0	0	1	1	0	2	0	0	8
Varicella	Varivax	Yes	0	5	3	1	1	0	3	0	2	0	0	0	15
Td/Tdap	DECAVAC	Yes	0	0	4	0	0	1	0	0	0	0	2	0	7
Td/Tdap	Adacel	Yes	0	0	0	0	0	0	0	0	2	0	1	0	3
Td/Tdap	Td	Yes	0	11	19	6	0	0	8	1	0	2	0	0	47
Smallpox	ACAM2000	Yes	0	4	22	12	1	0	11	0	1	0	0	0	51
Smallpox	ACAMBIS	Yes	1	0	0	0	0	0	0	0	0	0	0	0	1
Rotavirus	RotaTeq	Yes	0	0	0	1	0	0	0	0	0	0	0	0	1
Rotavirus	RotaShield	Yes	1	1	0	0	0	0	0	0	0	0	1	0	3
Polio	IPOL	Yes	0	9	14	1	1	1	7	0	0	0	0	0	33
PneumoConjugat	Prevnar13	Yes	0	0	0	1	0	0	0	0	0	0	0	0	1

Group Patients Report

The purpose of Group patients is to run either the Immunization History Report for a group of selected patients. To run one of these reports, complete the following steps:

1. Click **Group Patients** under the Reports section of the menu panel.



2. To run a report for patients in a specific birth date range, click on the check box on the first line. Enter a from birth date and to birth date in MM/DD/YYYY format.
3. To run a report for patients who have immunizations administered by one of your sites, click on the check box on the second line. Choose a site from the drop down list. By selecting this option, you will limit this report to immunizations administered at your site.
4. To run a report for patients who have an immunization in a specific date range, click on the check box on the third line. Enter a from and to date in MM/DD/YYYY format.

Note: You may combine any of the criteria in the above steps. The system only selects patients who fulfill all the criteria you specify.

5. You may choose a sort order. Your two options are either by Last Name then Age or by Age, then Last Name.
6. If you wish to start over, click the **Reset** button. The system erases all the criteria you entered and starts with a fresh page. You may proceed to enter your criteria again.
7. When criteria are completed, click the **Generate** button. Click the **Refresh** button periodically to check the status of the report. The system starts to generate the report and takes you to the Group Patient Reports Request Status screen.
8. After the report finishes generating, the top line on the Group Patient Reports Request Status screen becomes a hyperlink. Click the hyperlink.

Group Patient Reports Request Status				Refresh
Report Name	Started	Completed	Status	Patients
Immunization_History_Report	2010-09-16 05:55:59.0	2010-09-16 05:55:59.0	100%	3
Immunization_History_Report	2010-09-23 13:03:19.0	2010-09-23 13:03:24.0	100%	5

9. The system displays the report output in PDF.

Reminder/Recall

From the Reports menu option, you may generate reminder and recall notices, which include letters, mailing labels, and patient listings.

Note: Generation of reminder and recall notices
Reminder and recall notices can be generated for each patient, if the following conditions are met:

- The status is Active in the Patient Information Section for your organization.
- The Allow Reminder and Recall Contact? indicator in the Patient Information Section is Yes.
- The patient has complete address information listed in the Address Information Section.

Reminder Request Status screen

Depending upon the number of patients associated with your provider organization, it may take five minutes or more to generate the data for the various reports. While the data is being generated, the Reminder Request Status screen indicates the percentage of completion. Periodically click on Refresh to update the status.

Note: Once you reach the Reminder Request Status screen, it is not necessary to stay at this screen while your report is being created. You may go anywhere in IRIS while the report is generating and may return to the status screen by clicking on the Check Reminder Status link under Reports on the menu panel. Likewise, you may close out of IRIS and return to the status screen by clicking on the Check Reminder Status link after logging in again.

Summary Screen

When the report is complete, you may click on the blue date hyperlink to go to the Reminder Request Process Summary screen. The Summary screen lists the number of patients involved in the search and the criteria that were used to define the search. From the Summary screen, you may create various reminder output options.

Reminder Request Process Summary		
Reminder Request Criteria Name:		
Step	**Criteria Evaluated at this Step**	**Patients**
1	Patients **associated** with *IR Physicians*.	39
2	Patients **immunized** by *IR Physicians*.	30
3	Patients that are **active** within *IR Physicians* and **allow Reminder & Recall Contact**. Additional criteria includes: • Patients **born between 01/01/2007 and 01/01/2010**; • **County** is not specified; • **School** is not specified; • **Provider** is not specified;	17
4	Patients that have a **Valid Address**. Additional criteria includes: • **City** is not specified • **Zip Code** is not specified.	10
5	Patients that meet the following criteria regarding vaccination status: • Patients that are **Due Now** for one or more vaccinations **on or before** ; • Use all **vaccine groups**; • Use **tracking schedule** associated with each patient..	5
	Total Number of Patients Eligible for Reminder	**5**

Last Notice Date Options

On the bottom of the Reminder Request Process Summary screen, you have the option of resetting the last notice date, which will affect future reminder/recall notices generated using this information. Your options on the last notice date table include:

Last Notice Date Options	
Preview Patients that will display on the Reminder Recall Report.	Preview Patients
*Increment last notice date for all patients **eligible for this reminder**.*	Increment Eligible
*Increment last notice date for **all patients immunized** by IR Physicians.*	Increment Immunized
Return to the previous screen.	Cancel

1. Clicking **Preview Patients** will provide a list of patients included in the Reminder Recall Report. This information is presented on the screen and includes a hyperlink to each patient's demographic record.
2. Clicking **Increment Eligible** will reset the last notice date for all patients eligible for this reminder. The last notice date is viewable on the patient's demographic record under the organization information section.
3. Increment last notice date for all patients immunized by your organization.
4. Click **Cancel** to return to the Reminder Request Status screen.

Reminder/Recall Output Options

The Reminder Request Output Options table, found on the Reminder Request Process Summary screen, allows you to choose how you would like to use the data from your query.

Reminder Letters

The letter output option allows you to generate a standard form letter for the parent/guardian for each patient returned on your query. The letter allows room at the top for your organization's letterhead. The body of the letter includes the patient's immunization history, recommended immunizations and due dates. There are up to two lines for free text and/or a telephone number. To generate Reminder Letters:

1. Under the Additional Input column or the Letter section of the table, you have the option of entering:

Output	Description	Additional Input	
Reminder Letter	Standard Reminder Letter.	Report Name	
		Free Text	
		Phone #	

   a. If a Report Name is not indicated, the report will simply be named Reminder Letter on the Reminder Report Status screen.
   b. You may include a maximum of 400 characters in additional information in the Free Text field. Any information entered in this text box will be presented as the closing for each of the letters generated in your report.
   c. The telephone number is presented in the closing for each of the letters generated in your report.
2. Click **Reminder Letter**, which is a hyperlink.
3. Your report will be listed on the Reminder Request Status screen. The bottom table shows the name of the request, the date and time it was started and the status of the request.
   a. You have the option of moving to other portions of IRIS or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
   b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
4. Once the status displays as Ready and the report name becomes a hyperlink, your letters are ready to be viewed. Click the report name to view or print the letters in Adobe Reader®.
5. To print the letters, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
6. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

Dear Parent/Guardian of Jenny Appleseed,

Our records indicate that Jenny Appleseed, has received the following immunizations:

Immunizations Record	Tracking Schedule: ACIP	
Immunization	**Date Administered**	**Series**
Hib	04/12/2012	Not Valid
Influenza-seasnl	04/17/2012	
MMR	04/16/2012	1 of 2
PneumoConjugate	04/26/2012	Not Valid
Polio	04/04/2012	1 of 4
Smallpox	04/30/2012	
Td/Tdap	04/01/2012	1 of 2
Td/Tdap	04/25/2012	2 of 2
Td/Tdap	05/01/2012	Not Valid
Varicella	04/16/2012	1 of 2

Our records also show that Jenny may be due for the following immunizations. If Jenny received these or other immunizations from another health care provider, please call our office so that we can update Jenny's record. Otherwise please take Jenny to a health care provider to receive them.

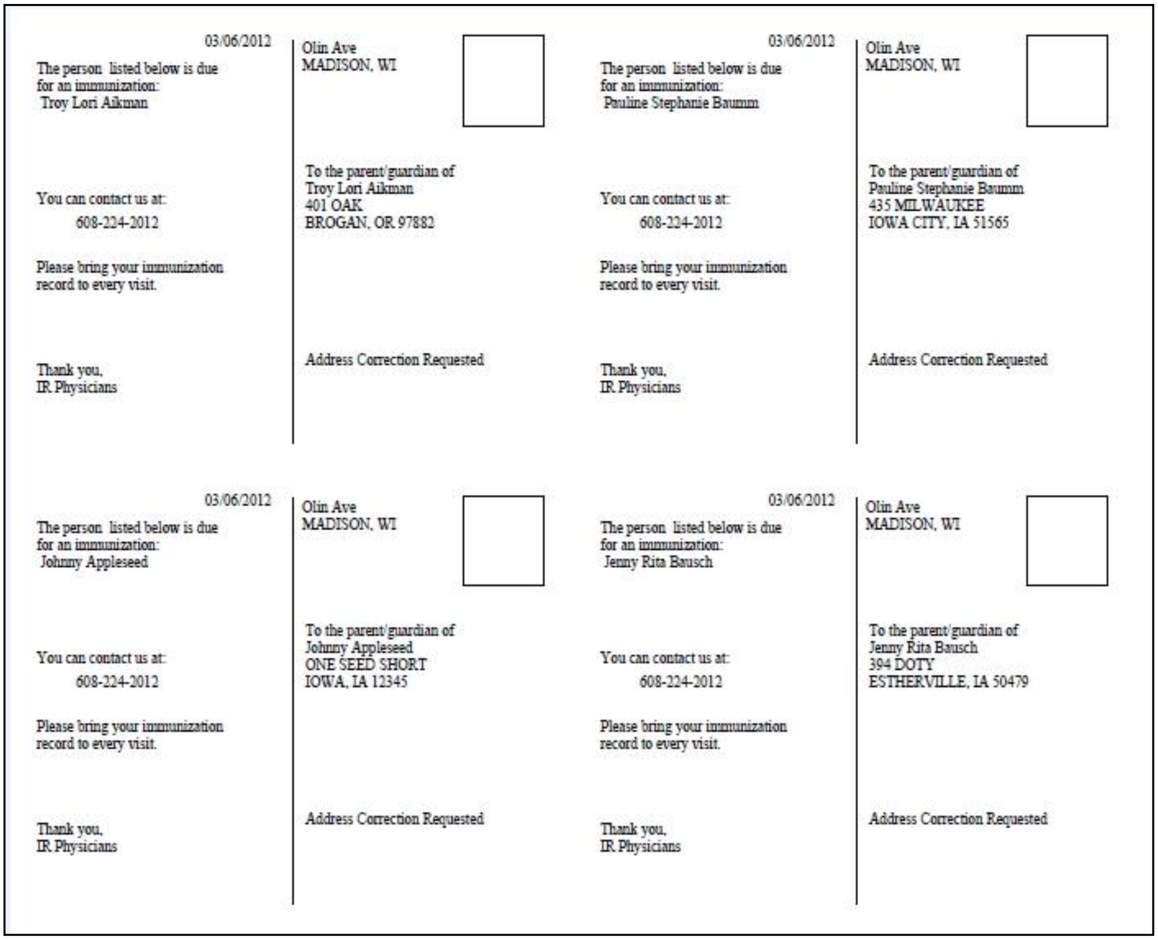
Immunizations Due
HPV for Females
HepA, NOS
HepB, NOS
MMR
Meningococcal, NOS

REminder Letter to folks

Reminder Card

The Reminder Card output option allows you to generate a standard reminder card for the parent/guardian for each patient returned on your query. There is a space for free text and/or a telephone number. To generate Reminder Cards (which will print 4 per page when run in this batch mode), follow these steps:

- Under the Additional Input column or the Letter section of the table, you have the option of entering the following information:
  - If a Report Name is not indicated, the report will simply be named Reminder Card on the Reminder Report Status screen
  - The telephone number is presented in the closing for each of the cards generated in your report.



03/06/2012
The person listed below is due
for an immunization:
Troy Lori Aikman

You can contact us at:
608-224-2012

Please bring your immunization
record to every visit.

Thank you,
IR Physicians

Olin Ave
MADISON, WI

To the parent/guardian of
Troy Lori Aikman
401 OAK
BROGAN, OR 97882

Address Correction Requested

03/06/2012
The person listed below is due
for an immunization:
Pauline Stephanie Baumm

You can contact us at:
608-224-2012

Please bring your immunization
record to every visit.

Thank you,
IR Physicians

Olin Ave
MADISON, WI

To the parent/guardian of
Pauline Stephanie Baumm
435 MILWAUKEE
IOWA CITY, IA 51565

Address Correction Requested

03/06/2012
The person listed below is due
for an immunization:
Johnny Appleseed

You can contact us at:
608-224-2012

Please bring your immunization
record to every visit.

Thank you,
IR Physicians

Olin Ave
MADISON, WI

To the parent/guardian of
Johnny Appleseed
ONE SEED SHORT
IOWA, IA 12345

Address Correction Requested

03/06/2012
The person listed below is due
for an immunization:
Jenny Rita Bausch

You can contact us at:
608-224-2012

Please bring your immunization
record to every visit.

Thank you,
IR Physicians

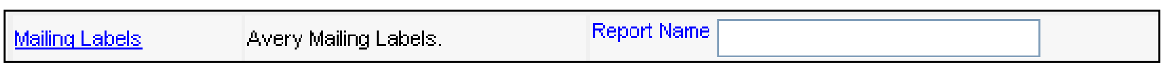
Olin Ave
MADISON, WI

To the parent/guardian of
Jenny Rita Bausch
394 DOTY
ESTHERVILLE, IA 50479

Address Correction Requested

Mailing Labels

The labels output option produces 30 labels per page on Avery Mailing Labels #5160. To generate mailing labels, follow these steps:



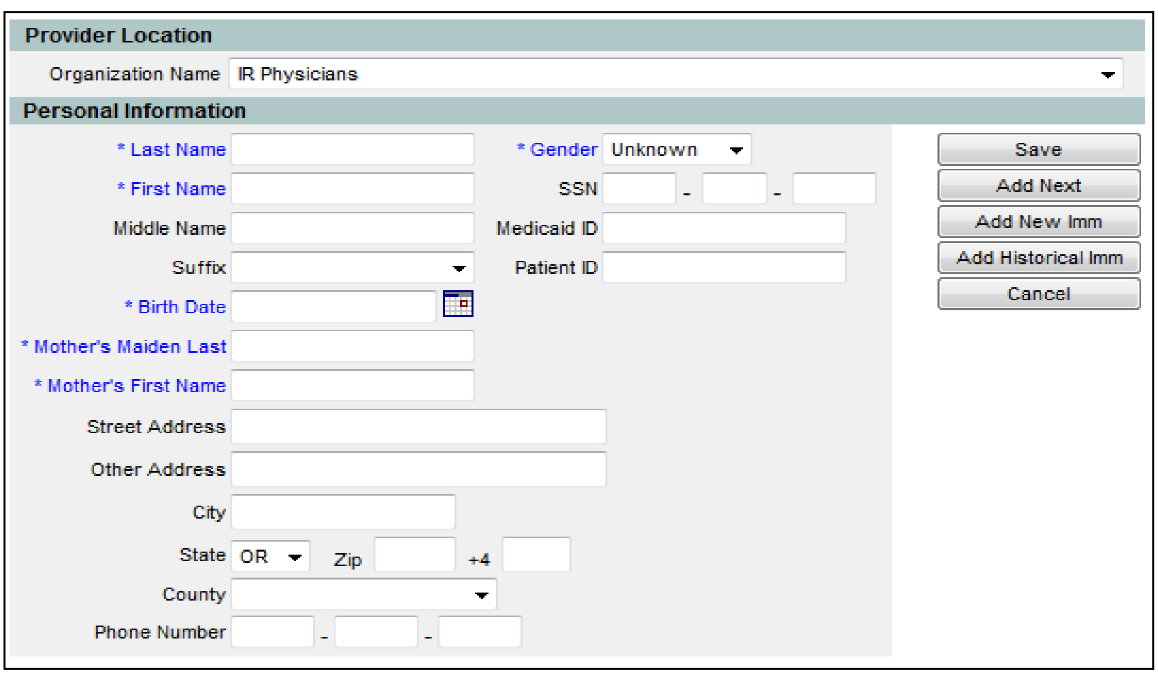
1. Click **Mailing Labels**, which is a hyperlink. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
2. You have the option of moving to other portions of IRIS or using other functions of your computer while you are waiting for your labels to process. To return to check the progress of your request, click **Check Reminder Status** under Reports on the menu panel.
3. If you choose to stay at the Reminder Request Status screen while your request is processing, click **Refresh** periodically to check the status.
    a. Once the report name becomes a hyperlink, the labels are ready. Click the report name to view or print the labels in Adobe Reader®.
    b. To print the labels, click on the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.

4. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

Patient Query Listing

The Patient Query Listing displays contact information for those patients identified as being due/overdue in the Reminder/Recall output in a report format. This report lists every patient that was returned in the report query process. To generate a Patient Query Listing:

1. Click the **Patient Query Listing** hyperlink.
2. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started and the status of the request.
    a. You have the option of moving to other portions of IRIS or using other functions of your computer while you are waiting for your report to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
    b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
3. Once the report name becomes a hyperlink, your report is ready. Click the report name to view or print the report in Adobe Reader®.
4. To print the report, click the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.
5. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.



Extract Client Data

The Extract Client Data displays patient demographic information, immunization history, and recommendations for those patients identified as being due/overdue in the Reminder/Recall output in XML format. This report lists every patient that was returned in the report query process. To extract client data in XML format:

1. Click the **Extract Client Data** hyperlink.
2. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.

Reminder Request Status

Started	Completed	Status	Patients	Target From	Target To
08/01/2011 05:58 AM	08/01/2011 06:01 AM	100 %	10	08/01/2011	08/01/2011
07/29/2011 07:11 AM	07/29/2011 07:12 AM	100 %	10	07/29/2011	07/29/2011
07/29/2011 07:06 AM	07/29/2011 07:07 AM	100 %	2	07/29/2011	07/29/2011
07/29/2011 07:06 AM	07/29/2011 07:07 AM	100 %	2		

Reminder Output Status

Name	Type	Requested	Started	Completed	Status
Client XML	Client XML	08/01/2011 06:24 AM	08/01/2011 06:24 AM	08/01/2011 06:24 AM	Ready
Reminder Letter	Reminder Letter	08/01/2011 06:01 AM	08/01/2011 06:01 AM	08/01/2011 06:01 AM	Ready

Creating Custom Letters

In addition to the standard letter, IRIS allows users to create and store up to three custom letters to be used for reminder/recall. To create a new custom letter, follow these steps:

1. Click **Manage Custom Letter** under Reports on the menu panel.

Manage custom letters

Long Test Nov 18 2010 Delete

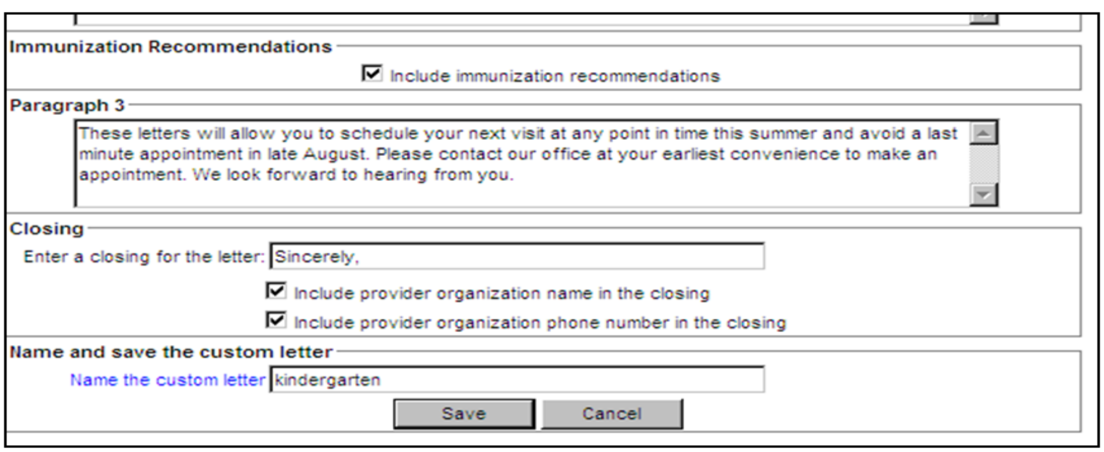
Long Test Oct 29 2010 Delete

New Custom Letter

2. Click the **New Custom Letter** hyperlink.
3. At the Create New Custom Letter screen, enter the following:
   a. Top Margin: Choose the number of blank lines you would like at the top of the letter from the drop down list provided. These blank spaces will leave room to print the letters on your office letterhead.
   b. Include Patient Address:

        i. Check the box to include the patient's address at the top of the letter.
    c. To include a name with the patient address, choose from the drop down list one of the following:
        i. (no name) - default
        i. Patient name
        ii. To the parent/guardian of patient name
    b. Salutation: Enter a greeting, and then choose a name option from the drop down list provided.
        i. If name is chosen, the name of the patient will show up after the salutation.
        ii. If responsible person is chosen, the letter will read <salutation> Parent/Guardian of <patient name>

4. Paragraph 1:
    a. In the field marked First Part, enter desired text.
    b. If you do not wish to include a name, you may enter all of the first paragraph text in the field marked First Part and select no name from the name drop down list.
    c. If you wish to include a name within the paragraph, enter text up to the mention of the name ending with a single space. Next, choose the name you would like to appear within the paragraph from the drop down list (either parent/guardian, patient name or no name).
    d. In the field marked Second Part, continue to enter the rest of the text.
    e. Immunization History: Check the box to include the patient's immunization history in the letter.

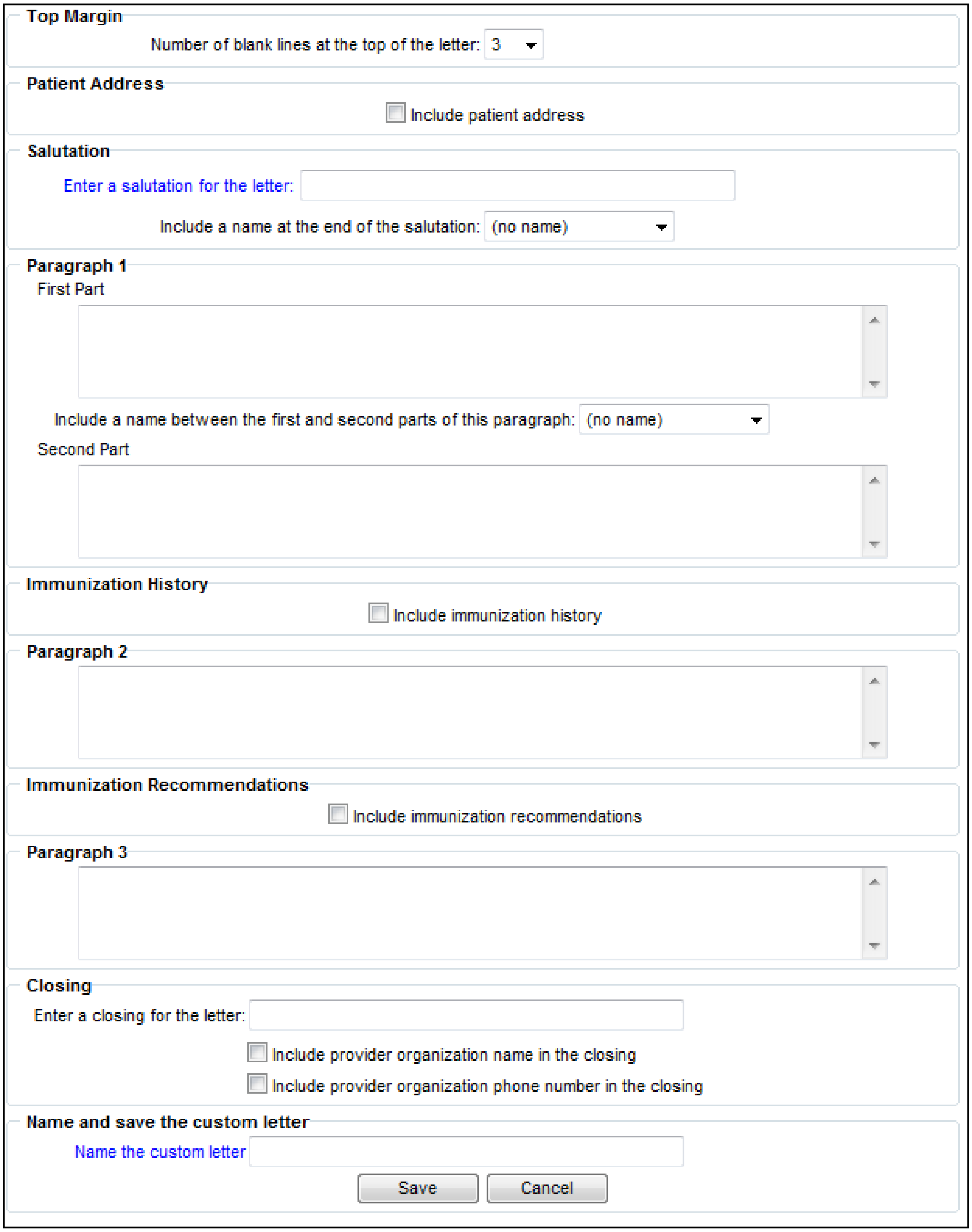


    f. The maximum amount of allowed characters in this field is 4,000.

5. Paragraph 2: You may enter more text in this field.
    a. Immunization recommendations: Check this box to include the immunization forecast for the patient in the letter.
    b. The maximum amount of allowed characters in this field is 4,000.

6. Paragraph 3: You may enter text in this field.

a. Closing: Enter a closing word or statement in this field. If you wish to include your provider, organization's name and/or telephone number after the closing, check the appropriate boxes.
b. Name and Save the Custom Letter: Enter a name for the letter in the field provided. When the letter is complete, click on Save.
c. The maximum amount of allowed characters in this field is 4,000.

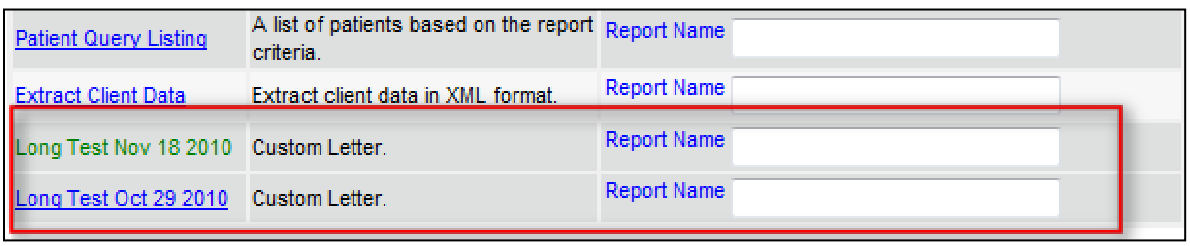


Note: Once you have saved the custom letter, click on check reminder status in the left hand menu bar. Then select the reminder report you want to use to generate your custom letter.

Generating Custom Letters

The custom letter output option allows you to generate a customized letter for each patient returned on your query. To create a new custom letter, refer to the Creating Custom Letters section of this chapter. To generate a custom letter from the Reminder Request Process Summary screen:

1. Every time you generate a custom letter, you will want to give the report a unique name. This name is different from the custom letter name. You will want to name the report prior to clicking on the custom letter hyperlink.
2. Click the link with the name of the custom letter. The letter will begin generating immediately.

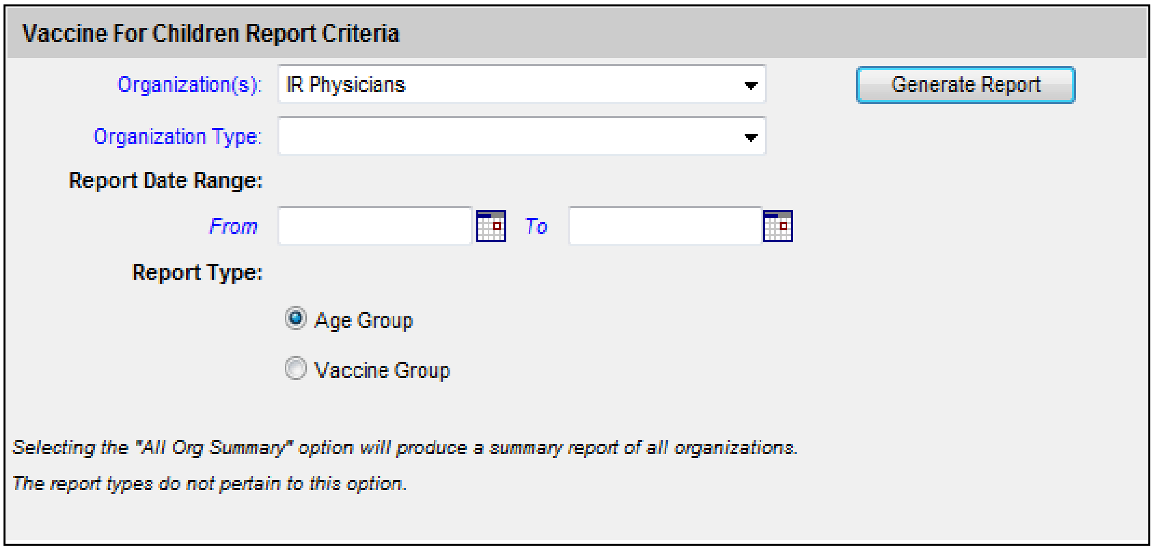


3. Your report will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started and the status of the request.
    a. You have the option of moving to other portions of IRIS or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
    b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
4. Once the report name becomes a hyperlink, your letters are ready. Click on the report name to view or print the letters in Adobe Reader®.
5. To print the letters, click on the printer icon on the Adobe® toolbar. Click on OK in the Print dialog box.
6. To print additional output, click on the back button on your browser. At the Reminder Request Status screen, click on the reminder request hyperlink (top table) to return to the Reminder Request Process Summary screen.

Vaccine Eligibility

The Vaccines for Children (VFC) Report details the number of patients that were vaccinated by your organization for each Vaccine Eligibility type for a specified date range. To generate a VFC Report:

1. Click **Vaccine Eligibility** under the Reports section of the menu panel.



2. Select the organization name from the drop-down list.
3. Enter a From date under the Report Date Range using the MM/DD/YYYY format.
4. Enter a To date under the Report Date Range using the MM/DD/YYYY format.
5. Choose a type of VFC Report to run. You have two choices:
    a. The Age Group report displays a summary of patients by vaccine eligibility and four specific age ranges: < 1 year of age, 1-6 years of age, 7-18 years of age and 19 years and older.
    b. The Vaccine Group report displays a summary of doses by vaccine eligibility and vaccine groups.
6. Click the **Generate Report** button.
7. The form displays in Adobe® Reader. To print the report, click on the printer icon on the Adobe® toolbar.
8. Click the **OK** button in the Print dialog box. To return to the Vaccines for Children Report Criteria screen, click the Back button on your browser.

Vaccines for Children by Provider

For Dates Between 03/01/2012 and 03/31/2012

Report run on: 05/31/2012 03:34 PM

Page 1

IR Physicians - Z90090

Key: Vaccine Eligibility Code		
A - Am. Indian/AK Native	N - No Insurance	Q - Not VFC Eligible
M - Medicaid Enrolled	U - Underinsured	

(Age)	M	N	A	U	Q	Total
<1	3	0	0	0	7	10
1-6	10	6	1	0	23	40
7-18	0	1	0	9	8	18
19+	7	3	2	2	10	24
Total	20	10	3	11	48	92

The key at the top of the report provides a listing of each vaccine eligibility code and its description. This report may show codes that are not available to your clinic.

Understanding the Vaccine Eligibility Report by Age Group

The following section explains the rows and columns within the Vaccine Eligibility report by Age Group. The report only displays patients who have received vaccines administered by your organization.

The rows on the report break down the count of distinct patients given immunizations by age in years. For example, patient who receives a vaccination when he or she is 6 years and 11 months old will be included in the 1-6 age group.

Row	**Description**
< 1	Patients who were under 1 year of age at the time a dose was administered
1-6	Patients who were 1 through 6 years of age at the time a dose was administered
7-18	Patients who were 7 through 18 years of age at the time a dose was administered
19+	Patients who were 19 years of age or older at the time a dose was administered

Each column on the report counts the number of distinct patients who have received immunizations associated with a vaccine eligibility category within the specified date range.

Chapter 13
Data Exchange

In this chapter:

Introduction

The Iowa Immunization Registry Information System (IRIS) has made available an interactive user interface on the World Wide Web for authorized users to enter, query, and update patient immunization records. The Web interface makes IRIS information and functions available on desktops around the state. However, some immunization providers already store and process similar data in their own information systems and may wish to keep using those systems while also participating in the statewide IIS. Others may have different needs and may decide they do not want to enter data into two diverse systems. For many clinics, electronic transfer is the preferred method to accomplish this goal.

This document explains how to exchange electronic data files with the IIS.

Data Frequency

Timely data submission to IRIS benefits providers and the patients they serve by making complete immunization records accessible through the system as soon as possible. IRIS encourages weekly data submissions whenever possible for all providers. Public clinics are required to submit data within 14 days of administration. Real-time data submission is also possible via Health Level Seven (HL7) real-time messaging (see Data Formats Accepted below).

Data Formats Accepted:

Data is typically pulled from Electronic Health Record (EHR) systems.
IRIS currently accepts the following electronic file types:

- Health Level Seven (HL7) Version 2.4 standard files
- Health Level Seven (HL7) Version 2.4 Real Time Transfer
- Fixed format flat text files

IRIS accepts and transmits the Health Level Seven (HL7) Version 2.4 standard for batch data loads to submit patient and immunization information to IRIS. This document defines requirements for Health Level Seven (HL7) Version 2.4 standard files. Additionally, IRIS allows providers to submit patient and immunization information and submit queries for this information via real-time messaging. For information regarding real-time messaging, please see the following document:

Data Exchange through IRIS

The data exchange feature of IRIS allows the capability to exchange patient, immunization and comment data files. Only IRIS state staff or other specified user roles will be able to perform data exchange.

Provider Organization Data Exchange

Prior to establishing data exchange, you must contact the IRIS staff at (1-800-374-3958) to arrange for testing either a Health Level 7 (HL7) or a Flat File that your organization will be sending. IRIS prefers to work with the organization's vendor or technical contact to test the file format first. Once that testing is complete, IRIS will run a test with each provider organization to ensure it is set up correctly in IRIS and able to upload data into the system.

Setting up your organization for Data Exchange

To set up your organization for Data Exchange you must call the IRIS Help Desk and provide them with the following information:

- your provider organization
- your vendor (EMR, Billing or Third Party)
- file format type (Health Level 7 (HL7), Flat File or Custom Flat File)

Creating a test file for Data Exchange

1. Contact IRIS Help Desk to receive the most up-to-date version of the file specifications for both HL7 and Flat File. You may also access Data Exchange Specifications through the Forms tab in IRIS.
2. Send IRIS staff a test file of at least 5-10 patient records. Include in this file a range of immunizations per patient. IRIS will check the file and run it in test mode.
    a. All combination vaccines and single vaccines should be tested.
    b. Provide at least 3 records where all patient information that you are allowing your clients to provide is entered (e.g., mother's maiden name, responsible person, patient status, etc).
    c. Let IRIS staff know if you are only collecting the required fields.
    d. Review code tables carefully, paying attention to spelling and codes that are only valid during specific time periods.
3. Ensure that the data in the test file matches the data in the system.
4. Once the file format has been tested and found to be correct, the IRIS Help Desk will walk your data exchange representative through the steps for data upload and explain the response files that are created. This process can take a few cycles of loading and testing until formats are finalized for imports.

Note: Files have a size limit of 150 MB combined of the patient, immunization, and comment files that can be uploaded via the user interface. If files are larger than 150 MB, they will need to be split into smaller files for loading.

Uploading a File for Data Exchange

The IRIS Help Desk (1-800-374-3958) will assist you with your first data exchange. This file will be sent into IRIS in test mode. Once your first file has been accepted in IRIS, it will be reviewed by your organization and the IRIS Help Desk. If both parties agree that the Data

Exchange was successful, then your organization will continue sending data into the IRIS application.

To perform a data exchange:

1. Click **Exchange Data** under Data Exchange on the menu panel. Depending upon the type of file format and direction of data you will be using, one or more of the following fields will display:
    a. *Job Name*: Fill in a name for the data exchange, if desired. If left blank, IRIS will use the current date for a job name.
    b. *HL7 File Name*: This field is required for users who are exchanging data using the HL7 file format. Click on Browse to select the HL7 file you wish to upload.
    c. *Patient File Name*: This field is required if you have chosen "bidirectional" or "provider organization to IRIS" as a data direction, and your file format is Flat File or Custom Flat File. Click on Browse to select the appropriate Patient File Name.
    d. *Immunization File Name*: This field is required if you have chosen "bidirectional" or "provider organization to IRIS" as a data direction, and your file format is Flat File or Custom Flat File. Click on Browse to select the appropriate Immunization File Name.
    e. *Comment File Name*: This optional field will appear if you exchange data via Flat File format and have chosen "bidirectional" or "provider organization to IRIS " as a data direction, or if you exchange data via Custom Flat File format. Click on Browse to select the appropriate Comment File Name.
2. Click the **Upload** button.

Note: Do not close the browser, click any other buttons, or navigate away from this page during the upload of the file. This can take several minutes. If the browser is closed or the screen refreshed before the file completes uploading, the source file will truncated and not all of the data will be loaded.

3. The Exchange Data Result screen will list the files that were uploaded using "bidirectional" or "provider organization to IRIS" data directions and will confirm the job name you entered or provide the date as a job name.

Exchange Data Status Past 7 Days | **Realtime?** No | Refresh

Job Name	User Name	Exchange Data Date	Process Start Date	Process End Date	Status
Job 07/07/2011 06:57:49	Cliff Gardner	07/07/2011 06:57:49	07/07/2011 06:57:49	07/07/2011 06:57:49	COMPLETE
Job 07/07/2011 06:57:31	Cliff Gardner	07/07/2011 06:57:31	07/07/2011 06:57:32	07/07/2011 06:57:33	COMPLETE

4. Click **Check Status**.
5. The Exchange Data Check Status screen will contain the job name, user name, exchange data date, process start and end date and status of the current job.
6. Click **Refresh** periodically to check the status of the job, it will not automatically update.
7. When a job is complete, the job name will appear as a hyperlink. Under the status column, one of three messages may appear.
    a. Complete: the job has completed processing
    b. Error: the job could not be processed because of formatting errors
    c. Exception: the job could not be processed because of an internal system error
8. Click the job name hyperlink.
9. If the job completed successfully, the Job Detail screen will display. This screen contains the following three sections:

Download Files for: Job 07/07/2011 06:59:47 Refresh | Cancel

Response File (3KB)

Download Log for: Job 07/07/2011 06:59:47

File	User Name	Download Date
No Download Logged		

Summary Information for: Job 07/07/2011 06:59:47

Description	Patient	Immunization	Comment
Processed	1	0	0
Accepted	1	0	0
New	0	0	0
Updated	1	0	0
Deleted	-	0	-
Already in ALERT IIS	0	0	0
Rejected	0	0	0
Pending	0	0	0
Unprocessed (patient rejected)	-	0	0
Inventory Updated	0	0	0
Inventory Not Updated	0	0	0

    a. Download Files for: <Job Name>: This section contains all output files available for you to download including the Response Files and any "IRIS to provider organization" download files. Click on the download name hyperlink to download the file.

b. Download Log for: <Job Name>: This section contains information regarding activity of the download file(s) including file name, user name, date, and time of the download(s).
c. Summary Information for: <Job Name>: This section contains a summary of all the information pertinent to the exchanged data file received and processed.

10. Review the summary figures to ensure complete uploads. The response files can be searched for record rejections.
11. Patients put into pending file are reviewed and merged (where a client already exists in the system). Once merging is complete, data are viewable in the IIS.

If the job did not complete successfully, the Job Error screen will display. This screen will contain an explanation of why the exchange data could not be processed the original uploaded file(s) and information regarding the activity of the downloaded file(s).

Data Collected via Data Exchange

Submit as much data as possible of the listed elements in the flat file or HL7 specifications. This will ensure a complete immunization record. In addition to required fields defined in the specifications (add links here), supplying additional data fields allows for record merging, and allows for electronic vaccine eligibility codeine, as well as for performance measure and vaccine recall efforts.

Due to the large volume of records IRIS receives from various sources, additional demographic and immunization information is essential to ensure IRIS matches immunization records reported from multiple sources appropriately. If you are unable to supply this information, IRIS will not be able to merge your data with other sources to obtain one complete immunization record. Records that are more complete benefit your clinic by providing you with the best possible client data. IRIS encourages sites to send as many demographic elements as possible (e.g., Address, Telephone number, Social Security Number, Mother's maiden name, Parent/guardian name, or Medicaid Number) to improve appropriate record matching.

HMO Data Exchange

All HMO/ MCOs will need to complete the same testing of their data file format as outlined above for provider organizations and EMRs. Prior to performing an HMO data exchange, your HMO will need to contact the IRIS Help Desk and arrange for your organization to be set up to perform data exchange.

You will need to provide the following information regarding the exchange:

- File format: HL7 or Flat File

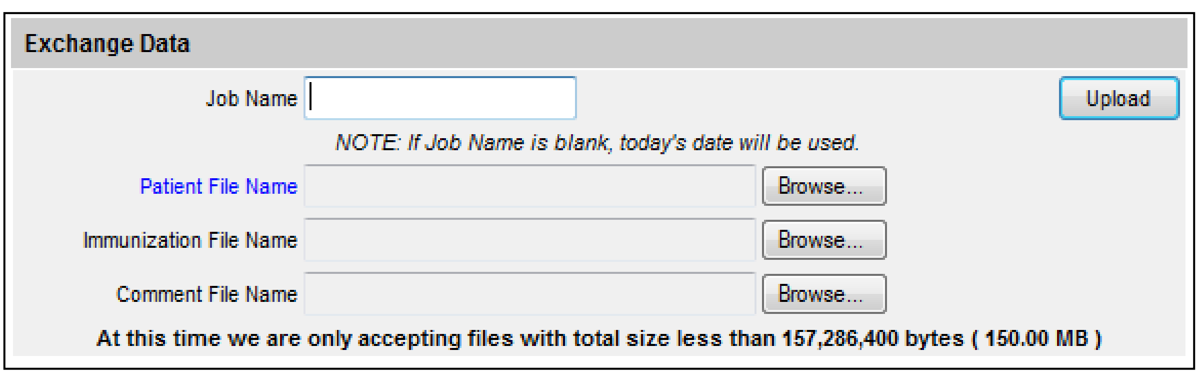
- Type of transmission: test or actual production transfer

To perform an HMO Data Exchange:

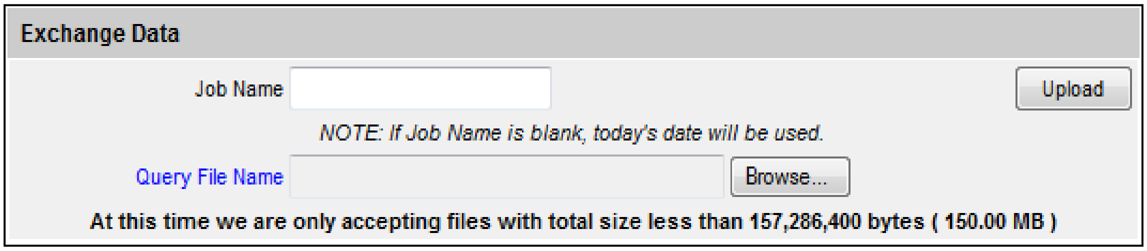
1. Click Submit HMO Data or Submit HMO Query under the Data Exchange menu option. Depending upon the selection made and the type of file format you are set up to use, one or more of the following fields will display:
    a. Job Name: Fill in a name for the data exchange, if desired. If left blank, IRIS will use the current date for a job name.
    b. For Flat File Submissions:
    c. Patient File Name: This field is required if your file format is Flat File. Click on Browse to select the appropriate Patient File Name.
    d. Immunization File Name: This optional field will appear if you exchange data via Flat File format. HMO/MCOs are not required to send immunization data.
    e. Comment File Name: This is an optional field that will appear if you exchange data via Flat File format.
    f. For HL7 File Submissions:
    g. File Name: This field is required for users who are exchanging data using the HL7 file format. Click on Browse to select the HL7 file you wish to upload.
    h. For HMO Query Files:
        i. This field is required for users who are running an HMO query. Click on Browse to select the appropriate query file. For the format of the HMO query, please see the HMO Query Specification.

Note: The HMO/MCO must first submit patient data into IRIS before a query will run successfully. Only patients that are shown to be affiliated with an HMO/MCO will be returned to the HMO via a data query.

Submit HMO Data Screen:

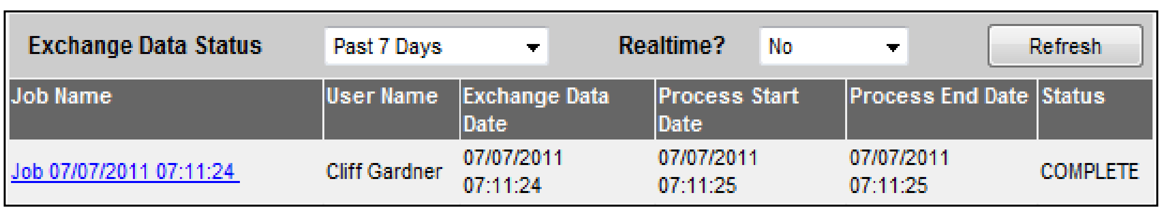


2. Submit HMO Query Screen:



3. Click **Upload**.
4. The Exchange Data Result screen will display, and list the files that were uploaded and confirm the job name you entered or provide the date as a job name.
5. Click the **Check Status** button.
6. The Exchange Data Status screen will display, and contain the job name, user name, exchange data date, process start and end date, and status of the current job.

7. Click **Refresh** periodically to check the status of the job.
8. When a job is complete, the job name will appear as a hyperlink. Under the status column, one of three messages may appear:
    a. Complete: has completed processing
    b. Error: could not be processed because of formatting errors
    c. Exception: could not be processed because of an internal system error

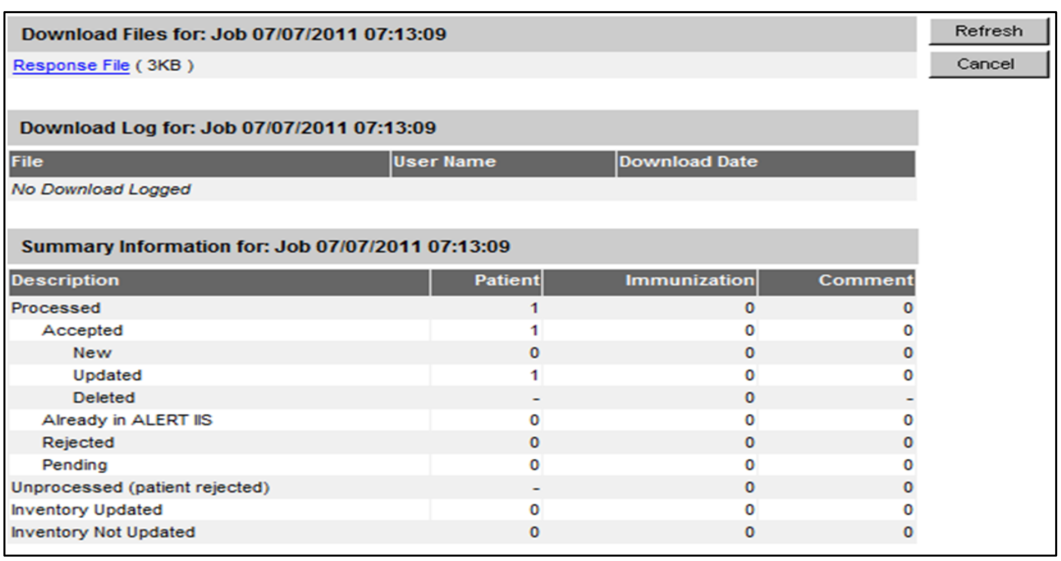


9. Click the job name hyperlink.
10. If the job completed successfully, the Job Detail screen will display. For jobs created from the Submit HMO Data menu option, these sections will display:
    a. Download Files for: <Job Name>: This section contains all output files available for you to download, including the Response Files and any "IRIS to provider organization" download files. Click on the download name hyperlink to download the file.

b. Download Log for: <Job Name>: This section contains information regarding activity of the download file(s), including file name, user name, and date and time of the download(s).
c. Summary Information for: <Job Name>: This section contains all information pertinent to the exchanged data file received and processed.

11. For jobs created using the Submit HMO Query menu option, the following sections will display:
    a. Download Files for: <Job Name>: Contains the Demographic File, Immunization File, and Exception File, all available for download by clicking on the file name hyperlink.
    b. Download Log for: <Job Name>: Contains information regarding activity of the download files.
12. If the job did not complete successfully, the Job Error screen will display. This screen contains an explanation of why the exchange data could not be processed, the original uploaded file(s), and lists information regarding the activity of the downloaded file(s).

HMO Query Format
Record Type
Record Identifier
First Name
Middle Name
Last Name
Birth Date



Download Files for: Job 07/07/2011 07:13:09

Refresh

Cancel

Response File (3KB)

Download Log for: Job 07/07/2011 07:13:09

File	User Name	Download Date
No Download Logged		

Summary Information for: Job 07/07/2011 07:13:09

Description	Patient	Immunization	Comment
Processed	1	0	0
Accepted	1	0	0
New	0	0	0
Updated	1	0	0
Deleted	-	0	-
Already in ALERT IIS	0	0	0
Rejected	0	0	0
Pending	0	0	0
Unprocessed (patient rejected)	-	0	0
Inventory Updated	0	0	0
Inventory Not Updated	0	0	0

HMO Query Result File Formats

Demographic
Chart Number
First Name
Middle Name
Last Name
Birth Date

Immunization
Chart Number
CPT
Vaccine Group
Administered Date
Filler

Exception
Chart Number
Record Type
Error Message

Chapter 14

School User

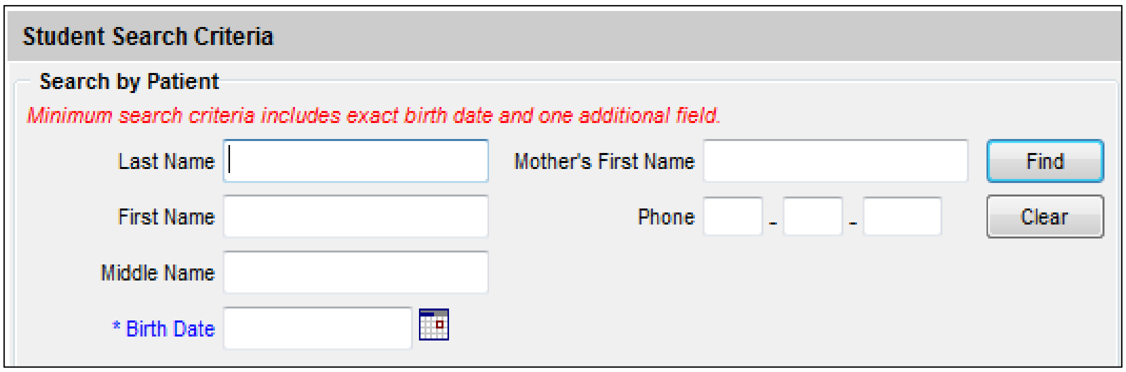
In this chapter:

Finding Student Screen

The Find Student screen is used to search and locate any student existing in the IRIS application using the child's date of birth and at least two letters of the first or last name.

There are two main sections used in the Find Student screen:

- Enter Search Criteria for a Student
- Search Results



Search Criteria

1. Click **Find Student** under the School Access menu group on the left side of the screen.
2. In the Student Search Criteria box, you must enter the student's birth date as a required field using the format of MM/DD/YYYY and one additional field.
    a. Last Name: Entering at least the first two letters of the student's last name, along with the birth date, will begin a search of all students whose last name begins with those letters.
    b. First Name: Entering at least the first two letters of the student's first name, along with the birth date, will begin a search of all students whose first name begins with those letters. If a student's first name is only one letter long, you may enter the single letter, but only exact matches will be displayed.
    c. Middle Name: Entering at least the first two letters of the student's middle name, along with the birth date, will begin a search of all students whose middle name begins with those letters. If a student's middle name is only one letter long, you may enter the single letter, but only exact matches will be displayed.
    d. Mother's First Name: Entering at least the first two letters of the mother's first name, along with the birth date, will begin a search of all students whose mother's first name begins with those letters. If the mother's first name is only one letter long, you may enter the single letter, but only exact matches will be displayed.

e. Phone: Entering the student’s main 7-digit phone number (area code not required) and birth date will identify individuals with the exact phone number in IRIS. However, this method is not recommended, as a phone, number may not be entered for a student, and phone numbers may change over time.

3. Click the **Find** button.

Entering Names

On all first and last names entered into IRIS for student searches, IRIS disregards spaces, apostrophes, and hyphens entered.

Search Results

Exact Student Match

An exact student match means IRIS returned only one student. When this occurs, the Student Immunization Record screen is displayed.

List of Possible Matches

A list of possible matches means the search returned more than one student match. All possible student matches returned are then displayed in a table. The student result table is sorted alphabetically by last name; first name, middle name, birth date, and gender are also included in the table for each student. Using the information displayed for each of the students in the table, the student can be selected by clicking on the Last Name. The Student Immunization Record screen is then displayed containing the student immunization information.

No Match Found

Be sure to search at least two different ways for students in the system. For example, you can search once using the date of birth and last name, and once using date of birth and first name. Parents may have immunization information but if the child was born in another state or received services from a provider who did not report to IRIS, the information may not be in IRIS.

Threshold Limit

When searching in the database, if the number of students exceeds 75 matches, then no students will be listed. Instead, the following message will display:

"XX students were found. Please refine your search criteria to limit your student list." (XX is the total number of students found in the search.)

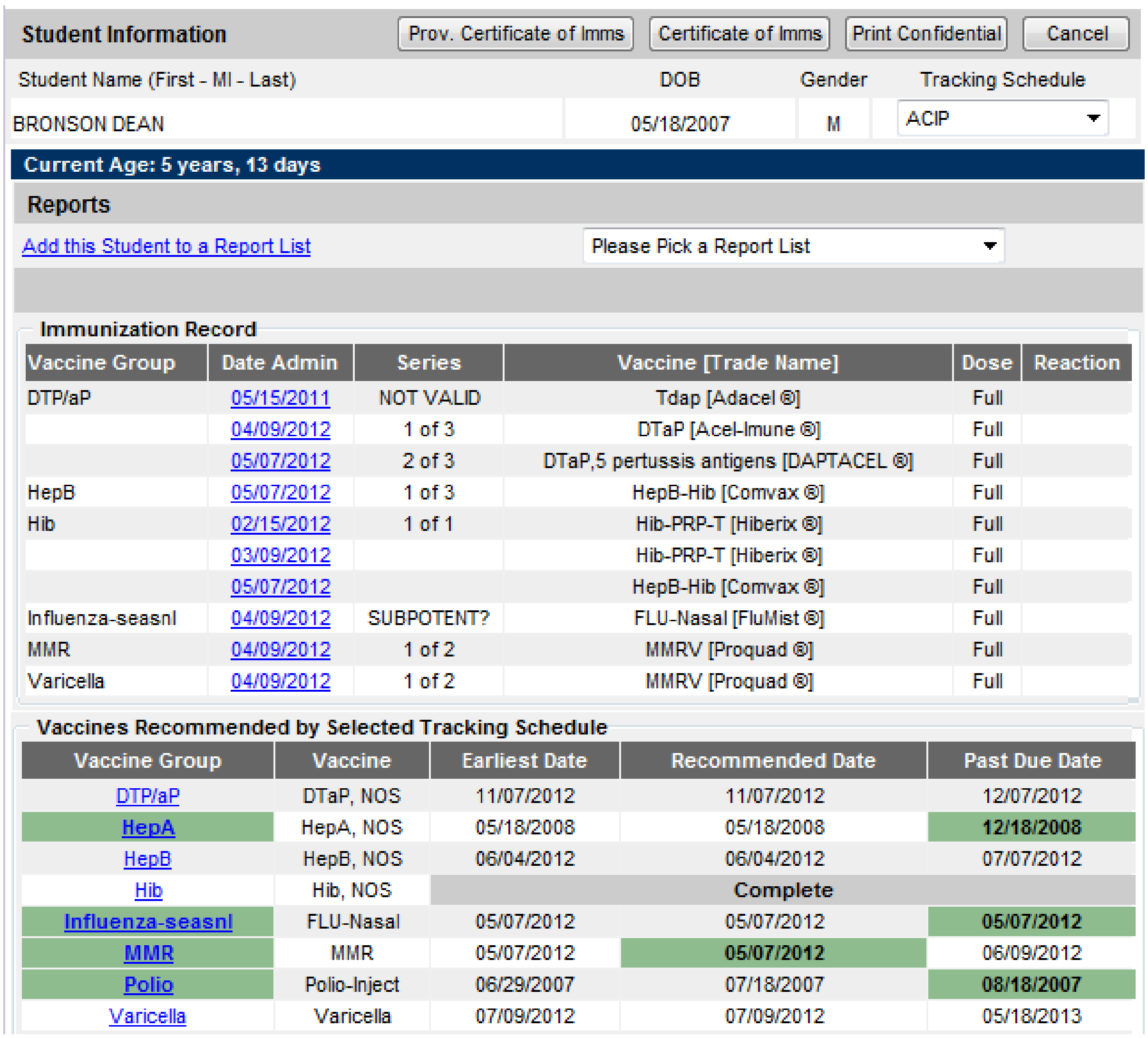
In the unlikely event you receive this message, clear your search criteria and try again with more detailed information.

Student Immunization Record Screen

The Student Immunization Record screen displays a student's immunization history and provides immunization recommendations. From this screen, you are able to select and add the student to a specific student list. This will allow you to run reports that include the student.

There are three main sections used in the Student Immunization Record screen:

- Student Information
- Immunization Record
- Vaccines Recommended



Student Information Prov. Certificate of Imms | Certificate of Imms | Print Confidential | Cancel

Student Name (First - MI - Last)	DOB	Gender	Tracking Schedule
BRONSON DEAN	05/18/2007	M	ACIP

Current Age: 5 years, 13 days

Reports

Add this Student to a Report List — Please Pick a Report List

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Reaction
DTP/aP	05/15/2011	NOT VALID	Tdap [Adacel ®]	Full	
	04/09/2012	1 of 3	DTaP [Acel-Imune ®]	Full	
	05/07/2012	2 of 3	DTaP,5 pertussis antigens [DAPTACEL ®]	Full	
HepB	05/07/2012	1 of 3	HepB-Hib [Comvax ®]	Full	
Hib	02/15/2012	1 of 1	Hib-PRP-T [Hiberix ®]	Full	
	03/09/2012		Hib-PRP-T [Hiberix ®]	Full	
	05/07/2012		HepB-Hib [Comvax ®]	Full	
Influenza-seasnl	04/09/2012	SUBPOTENT?	FLU-Nasal [FluMist ®]	Full	
MMR	04/09/2012	1 of 2	MMRV [Proquad ®]	Full	
Varicella	04/09/2012	1 of 2	MMRV [Proquad ®]	Full	

Vaccines Recommended by Selected Tracking Schedule

Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
DTP/aP	DTaP, NOS	11/07/2012	11/07/2012	12/07/2012
HepA	HepA, NOS	05/18/2008	05/18/2008	12/18/2008
HepB	HepB, NOS	06/04/2012	06/04/2012	07/07/2012
Hib	Hib, NOS	Complete		
Influenza-seasnl	FLU-Nasal	05/07/2012	05/07/2012	05/07/2012
MMR	MMR	05/07/2012	05/07/2012	06/09/2012
Polio	Polio-Inject	06/29/2007	07/18/2007	08/18/2007
Varicella	Varicella	07/09/2012	07/09/2012	05/18/2013

Student Information

The Student Immunization Record screen displays a student information header at the top of the page. This section includes student name, date of birth (DOB), gender, and selected tracking schedule. The information contained in this section can be used to confirm that you have located the correct student.

Tracking Schedule

Select the appropriate tracking schedule from the drop down menu. This function allows users to change the tracking schedule to evaluate the record according to school law requirements based on the grade of the student. If a grade level tracking schedule is selected, the Earliest Date, Recommended Date and Past Due Date will be the same and identify vaccines for which the student is incomplete according to school requirements. ACIP is the clinical schedule and is the default.

Certificate of Immunization Form

Clicking on the Certificate of Imms button will allow users to print the official Certificate of Immunization.

Provisional Certificate of Immunizations Form

Clicking on the Prov. Certificate of Imms button will allow users to print the official Provisional Certificate of Immunization.

Print Confidential

This button allows you to print the record showing on the screen. This record may be helpful for parents when scheduling immunizations for their child.

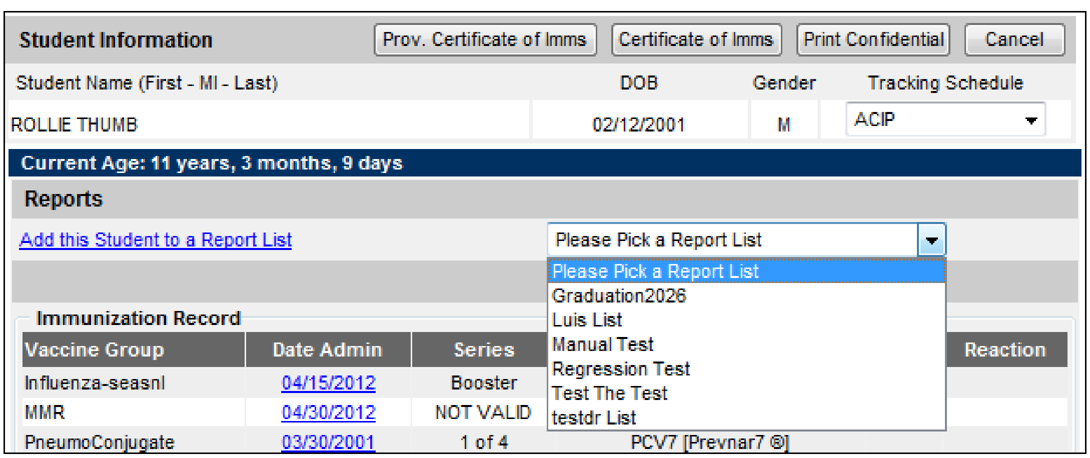
Cancel

This button cancels the screen and takes you back to the previous screen.

Adding Students to a Report List

To add a student to a list, you must have first created specific student report lists in the Manage Lists section of the application. See the Manage List Screen section of this chapter for details.

1. Click the “Please pick a Report List” drop-down menu and select your list from the available options.
2. Then click the “Add this Student to a Report List” hyperlink.
    a. Students can be added to more than one list.



Student Immunization Record

The Immunization Record table lists all vaccinations the student has received to date. Immunizations listed in the table are ordered alphabetically first, then by 'Date Administered'. The table columns are defined as follows:

- Vaccine Group
    - Lists the vaccine group name for each immunization received.
- Date Admin
    - Lists the date the student received the vaccine.
- Series
    - Denotes the sequence number within the immunization series and contains messages such as “Not Valid”, if the vaccine does not meet the requirements of the selected tracking schedule.
- Trade Name
    - Displays the trade name of the vaccination received.
- Dose
    - Indicates whether full, half, or multiple doses were administered to the student. A blank field is the default for a full dose.

Note:
Doses marked as Subpotent or Not Valid are recorded on the Certificate of Immunization and Provisional Certificate of Immunization.

The student's age appears in a solid blue field between the student information and reports sections.

Vaccines Recommended

Find the recommended vaccinations and corresponding dates for the student in the Vaccines Recommended by Selected Tracking Schedule table. The vaccine group list shows all vaccinations included in the tracking schedule assigned to this student. The table columns are defined as follows:

Vaccine Group	Displays the vaccine group name.
Vaccine	Displays the specific vaccine name.
Earliest Date	Displays the earliest date the student could receive the immunization. If the tracking schedule selected is for a certain grade range (not ACIP), the Earliest Date will be when the student is incomplete for the vaccine according to Iowa school law requirements.
Recommended	Displays the date that the student is recommended to receive the

Date	immunization. If the tracking schedule selected is for a certain grade range (not ACIP), the Recommended Date will be when the student is incomplete for the vaccine according to Iowa school law requirements.
Past Due Date	Displays the date that the student is past due for the immunization. If the tracking schedule selected is for a certain grade range (not ACIP), the Past Due Date will be when the student is incomplete for the vaccine according to Iowa school law requirements.

Patient Information

Patient Name (First - MI - Last)	DOB	Gender	Tracking Schedule
CORI THUMB	01/28/1998	F	ACIP

Current Age: 14 years, 3 months, 20 days

Immunization Record

Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose
HepB	02/03/2012	1 of 3	DTaP-HepB-IPV [Pediarix ®]	Full
Polio	02/03/2012	1 of 4	DTaP-HepB-IPV [Pediarix ®]	Full
Td/Tdap	02/03/2012	1 of 2	DTaP-HepB-IPV [Pediarix ®]	Full

Vaccines Recommended by Selected Tracking Schedule

Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
DTP/aP	DTaP, NOS	Maximum Age Exceeded		
HepA	HepA, NOS	01/28/1999	01/28/1999	08/28/1999
HepB	HepB, NOS	03/02/2012	03/02/2012	04/03/2012
HPV	HPV for Females	01/28/2007	01/28/2007	01/28/2024
Influenza-seasnl	Influenza, NOS	01/28/2007	08/01/2011	01/28/2007
Meningo	Meningococcal, NOS	01/28/2009	01/28/2009	01/28/2011
MMR	MMR	01/28/1999	01/28/1999	05/28/1999
Polio	Polio-Inject	03/02/2012	03/02/2012	05/03/2012
Td/Tdap	Tdap	03/02/2012	03/02/2012	04/03/2012
Varicella	Varicella	01/28/2011	01/28/2011	01/28/2011

Note:
The Earliest Date, Recommended Date, and Past Due Date are the same if a school grade level tracking schedule is selected. Students are incomplete for that vaccine starting on this date. The Earliest Date is the recommended date for the student to receive the vaccine.

The dates found in the Vaccines Recommended by Selected Tracking Schedule table are shaded with color for emphasis. The colors applied to the dates within the columns are defined as follows:

Green: fills the background when the current date is on or after the recommended or past due date.

Grey: fills the background when a vaccine cannot be given because that immunization series is complete, contraindicated, maximum age exceeded, or the patient has immunity or medical exemption.

Maximum Age Exceeded: reflects whether a student has exceeded the maximum age to receive a specific vaccine. For example, if a student has already reached the age of five years and has not completed the Hib series, then the recommendation for Hib at the bottom of the student immunization history will show Maximum Age Exceeded.

Maximum Doses Met or Exceeded for Vaccine Group: indicates that the maximum number of doses recommended have been administered for the specified vaccine series according to the tracking schedule.

Complete: indicates that an immunization series has been completed according to the tracking schedule.

Immunity Recorded for Vaccine Group: indicates history of disease or vaccine history. If this message appears for varicella, this should be treated as history of chickenpox disease.

Contraindicated: indicates the vaccine should not be given for medical reasons. If this message appears for varicella, this should be treated as history of chickenpox disease.

Note:
Religious exemptions are not recorded in IRIS and are not displayed.

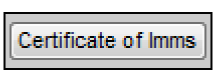
Printing a Provisional Certificate of Immunizations or Certificate of Immunization

To print out a record in the format of a Provisional Certificate of Immunization form:

1. Click the 

button
2. Click **File** and then click **Print**

To print out a record in the format of a Certificate of Immunization form:

3. Click the 

button
4. Click **File** and then click **Print**

To print out the Student Immunization Record screen:

1. Click the **Print Confidential** button.
2. Click **File** and then click **Print**.

This page can be used to look at dates when students will be due for vaccines. Click the Back button on your browser to return to the student record.

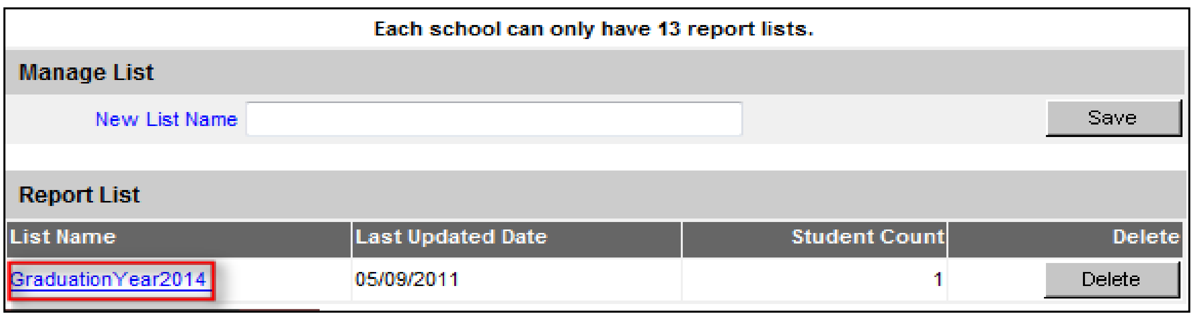
Note:
If you are printing the Student Immunization Record for a parent, choose ACIP as the tracking schedule to show the clinically recommended dates and select Print Confidential.

Manage List Screen

The Manage List screen is used to create new and manage existing student lists to be used for generating reports. A maximum of 26 lists can be created by each school district.

There are two main sections used in the Manage List screen:

- Manage List
- Report List



Manage List	Creates new lists for your school in IRIS.
Report Lists	Displays a table of all lists added to IRIS by your school in alphabetical order.
List Name	Displays the name given to the list by your school. If you click the list name, you can view a detailed display of your students within the list.
Last Updated Date	Displays the date on which the list was last updated.
Student Count	Displays the number of students within the list. The count is determined by how many students are assigned to the list.
Delete	Displays a delete button for each list. If you click the delete button, the list will be deleted.

Note:
Once you delete a list, you cannot retrieve it. Deleting a list removes all students from the list.

Creating a New Student List

1. Click **Manage Lists** under the School Access menu group on the left side of the screen.
2. Enter a list name in the New List Name text field.
3. Click the **Save** button to add the list name.
4. The message will appear at the top, “The list has been created successfully”. An example of a list name may be: Class of 2015. You will later add students to this list.

Note:
Once you create a list, you cannot edit the name of it. Make sure to choose a list name that will not need to be revised (avoid generic names or current references such as kindergarten). Instead, use titles such as Class of 2020, Class of 2021, etc., using the year of high school graduation.

Removing a List

1. Click the **Delete** button to the right of the list.
2. When the Delete button is clicked, you will be given a prompt “Are you sure you want to delete this list?” Options are either **OK** or Cancel.
3. Clicking **OK** will delete the list and remove it from the Manage List screen. Clicking on Cancel will cancel the delete and return you to the Manage List screen.

Opening the Reports/Client List Screen

1. Click a list name for the list you wish to view.
2. You will be taken to the Reports/Client List screen where you can view your student list. Further explanation can be found on the Reports/Client List Screen section, below.

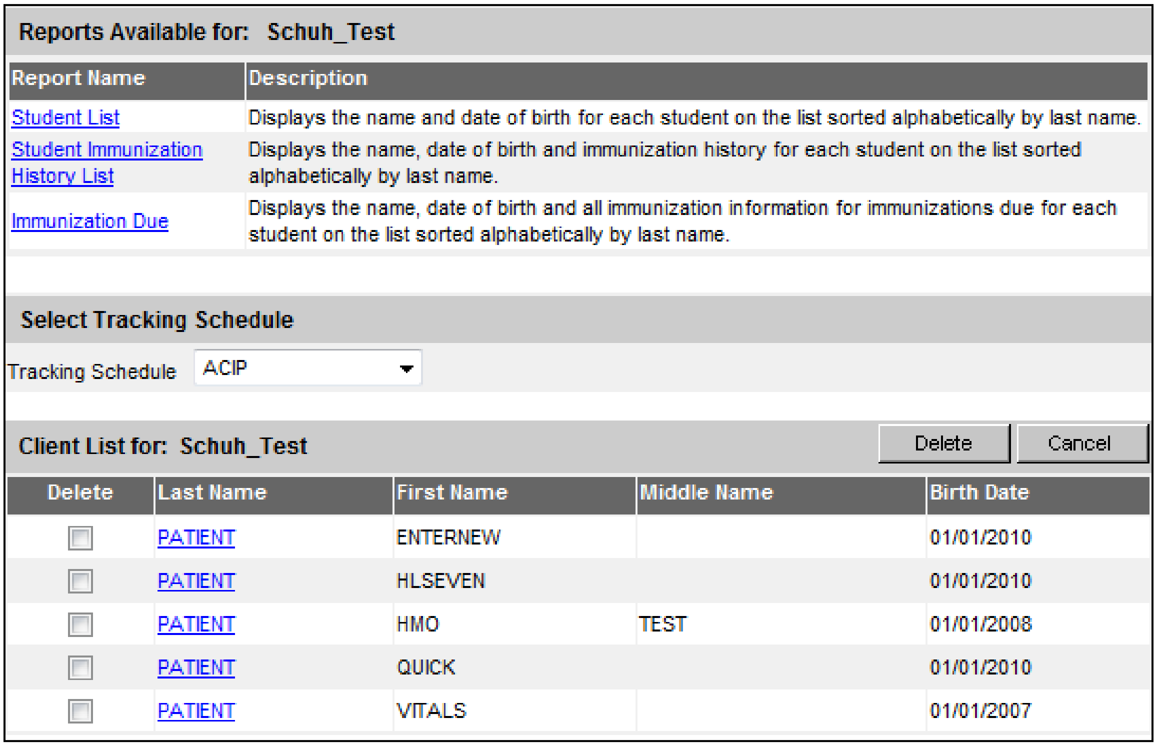
Note:
You can only view details of a list that contains students. A list with zero count will not link to the Reports/Client List screen.

Reports/Client List Screen

The Reports/Client List screen is used to view students added to your school list and run reports for the students in the list. You can also view a student's immunization record and remove a student from your list.

There are three main sections used in the Reports/Client List screen:

- Reports Available: (List Name)
- Select Tracking Schedule
- Client List for: (List Name)



Reports Available for: Schuh_Test

Report Name	Description
Student List	Displays the name and date of birth for each student on the list sorted alphabetically by last name.
Student Immunization History List	Displays the name, date of birth and immunization history for each student on the list sorted alphabetically by last name.
Immunization Due	Displays the name, date of birth and all immunization information for immunizations due for each student on the list sorted alphabetically by last name.

Select Tracking Schedule

Tracking Schedule ACIP

Client List for: Schuh_Test Delete Cancel

Delete	Last Name	First Name	Middle Name	Birth Date
☐	PATIENT	ENTERNEW		01/01/2010
☐	PATIENT	HLSEVEN		01/01/2010
☐	PATIENT	HMO	TEST	01/01/2008
☐	PATIENT	QUICK		01/01/2010
☐	PATIENT	VITALS		01/01/2007

Reports Available for Schools

This section can generate three student reports within the selected list:

Student List	Displays the name and date of birth for each student on the list, sorted alphabetically by last name.
Student Immunization History	Displays the name, date of birth, and immunization history for each student on the list, sorted alphabetically by last name.
Immunization Due	Displays the name, date of birth, and all immunizations due for each student on the list, sorted alphabetically by last name.

Select Tracking Schedule

Choose the appropriate tracking schedule from the drop down menu. This function allows users to set the tracking schedule for each report in order to evaluate all of the records of all the students listed based on the school law requirements for their grade level to identify those students who are incomplete.

Generating the Student List Report

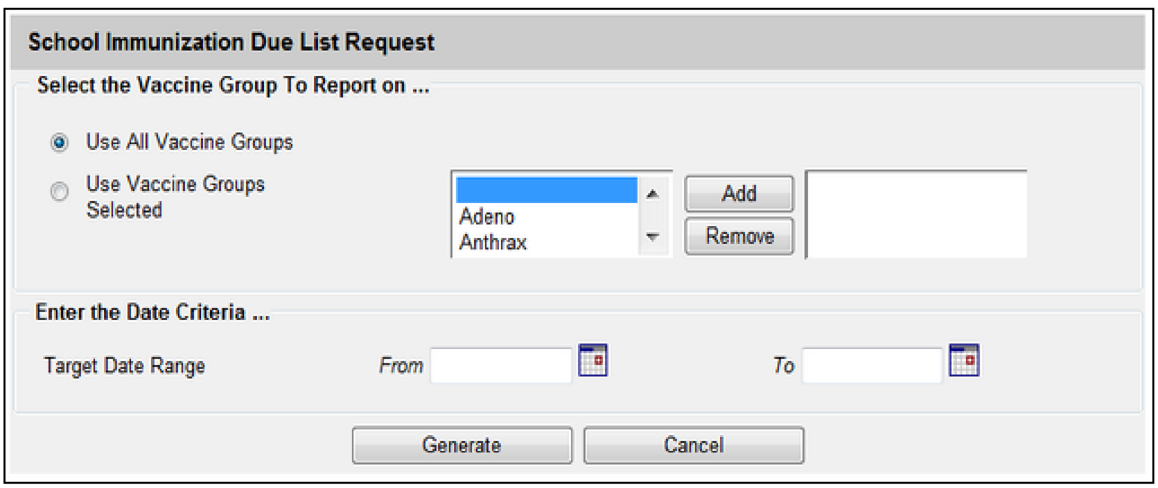
1. Click the **Student List** link.
2. The Student List report will open in a PDF document.
3. Click the Back button on your browser to return to the Reports/Client List screen.

Generating the Student Immunization History List Report

1. Click the **Student Immunization History List** link. You will be taken to the Check School Report screen where you can view the status of the report you are running.
2. Click **Refresh** periodically until the status displays 100%. You can also click "Check School Report" on the menu on the left side to see if the report is finished.
3. Once your report has finished generating, the report name will turn blue, and the report status will display "ready". You can now click the link and view the report.
4. The report displays the immunization history and the recommended vaccines for each student on your list according to the Tracking Schedule selected on the Reports/Client List screen.
5. Click the Back button on your browser to return to the Reports/Client List screen.

Generating the Immunizations Due List Report

When requesting the Immunizations Due report you will be taken to a screen where you can enter criteria used for the report. The criteria for this report are explained below.



Selecting Vaccine Groups

The majority of the time, you will Click Use All Vaccine Groups. The immunization due dates will be based on the tracking schedule you have selected for this report. If a student is past due for any of the vaccines in the tracking schedule (for example, if he/she is past due for any vaccines required for kindergarten and you have selected the Kindergarten tracking schedule), then he or she will be included in the report outcome, given all other report criteria are met. If no students are listed in the report, then all students on the list are complete or up-to-date for the selected date range.

Choosing vaccine groups allows you to focus on a specific vaccine(s) within the selected tracking schedule. If the student is past due for any of the selected vaccine groups, then he or she will be included in the Immunizations Due List report, given all other report criteria are met. For example, you can use this report if you want to see which students on the list are due for a specific vaccine or if there is an outbreak of disease and you need to identify students on your list that may be lacking that vaccine. This report could be used to produce a list of susceptible students at your school if all of the students attending your school have all of their immunization dates in IRIS.

1. Within the Select the Vaccine Group(s) section, select either **Use All Vaccine Groups** or **Use Vaccine Groups Selected**.
    a. If the Use Vaccine Groups Selected option is selected, choose the vaccine groups to be included.
2. Scroll though the vaccine group list and double-click the desired vaccine group name, or click the vaccine group name and then click the Add button.
    a. All selected vaccine groups will appear in green in the box to the right.
3. To remove any vaccine groups from the report criteria, either double-click the selected vaccine group name in the right list box, or click the selected vaccine group name and then click the Remove button.

When the report is generated, the only students that will appear on the list are those students who are due for the vaccine group(s) selected in the report criteria, but the report will show all vaccines included in the tracking schedule.

Selecting Target Date Range

When dates are specified, the report will only return those students that were, are, or will be overdue for the selected vaccine groups on a date falling within the target date range entered.

Note:
The To date in the target date range may be set to the day your report is due to the local health department to identify students who will be due for a vaccine by this date.

4. Enter the Target Date Range in the From and To text boxes in the form MM/DD/YYYY, or Click the calendar icon to set the date.
    a. The From date, To date, or both dates can be left unspecified:
        i. If the To date is unspecified for the Target Date Range, the report date range will include the From date up to and including today's date.
        ii. If the From date is unspecified for the Target Date Range, the report date range will include all dates prior to and including the To date.
        iii. If both dates are left unspecified for the Target Date Range, then today's date will be entered for both From and To fields.
5. Click **Generate**.

    a. You will be taken to the Check School report screen where you can view the status of the report you are running.
6. Click **Refresh** periodically until the status displays 100%. You can also click “Check School Report” on the menu on the left side to see if the report is finished.
    a. Once your report has finished generating, the report name will turn blue, and the report status will say “ready”.
7. Click the link and view the report, which displays the Immunizations Due for each student on your list.
    a. If you selected a future date, then all children on the list will require vaccines by the date selected, but Due will only be displayed for those vaccines that are past due or due now. You will have to manually evaluate the rest of the record to identify those vaccines that are due before the future date selected.
8. Compare to see if all of the student’s immunizations are in the IRIS if you have information from another source.
    a. Parents may have additional information if the child was born in another state or received services from a provider who did not report to IRIS.
    b. Additional dates can be written on the printed Certificate of Immunization but will not be reflected in the Immunizations Due report for students.
    c.

Note:
There are two places in the IRIS where you can select a tracking schedule. If you want to run a report for a group of students using a specific tracking schedule, such as Kindergarten, select the tracking schedule on the Reports/Client List screen. If you want to see the immunizations due for one student only, find the student and then select the tracking schedule on the Student Immunization Record screen.

Client List

This section is for viewing student immunization records and removing a student from your list. Information contained within the student list table is described below.

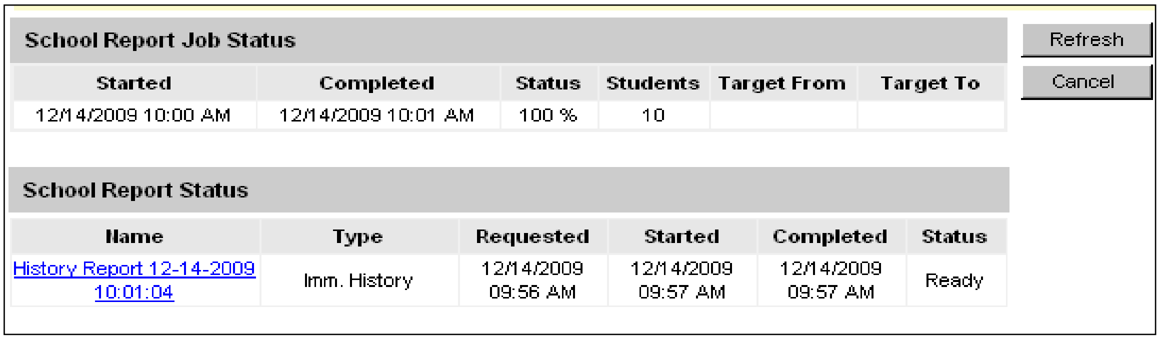
Delete	If you wish to remove a student from your list, place a checkmark in the box beside the student’s name in the Delete column. Remove more than one student at a time by checking multiple students. Next, Click the Delete button. Once you have confirmed the delete, a message will display "The list has been updated successfully" and your student(s) will be removed.
Last Name	Displays the student’s last name and provides a link back to the Student Immunization History screen.

First Name	Displays the student's first name.
Middle Name	Displays the student's middle name.
Birth Date	Displays the student's birth date.

Check School Report Screen

The Check School Report screen is used to display and/or determine the status of a report request. The screen is separated into two sections:

- School Report Job Status
- School Report Status



School Report Job Status

This section displays the date and time a report was started and completed, the overall status in percentage, the number of students returned and the target date range if one was specified. Status will update by clicking the Refresh button. You can only have one job listed in this section. Once you run a new report, your previous job will be erased.

School Report Status

This section displays reports generated from the Reports/Client List screen. It contains the name of the report, the type of report, the date and time the report was requested, what time it started and the status. Reports will be sorted by time generated, with the latest report at the top.

To get the latest update on all the requests listed in the table, click the **Refresh** button. This will show the most current status for each request from the IRIS database.

You do not have to remain on this screen while the reports are running. You can navigate away from this screen and go somewhere else in the application while your report runs in the background. To get back to the School Report Status screen, Click the Check School Report link on the left menu panel.

As soon as the report name appears as a hyperlink and the Status displays Ready, it has completed processing and is ready for viewing. To view the report, Click the report name hyperlink. This process can take some time depending on the size of the report. The selected report will automatically display using the Adobe Acrobat Reader. If there is a problem viewing your report, please contact the IRIS Help Desk. At any time, click the **Cancel** button to return to the previous screen you were previously on.

Appendix 1

In the Appendix:

Online Help
IRIS Help Desk

Online Help 

The IRIS online help function provides you with both screen-specific help and a general help index. You may access online help from any screen in IRIS by pressing the yellow light bulb on the menu bar in the top right corner of the screen.

Screen-Specific Help

To access screen-specific help, follow these steps:

When on any screen where you would like help, click on the light bulb on the menu bar located at the top-right of the screen.
A box with screen-specific help information will display. This help box may have any or all of the following features:

- **Purpose:** describes what the screen is meant to do or what kind of information needs to be entered.
- **Information provided:** describes in detail the input and output fields that are found on the screen.
- **Functionality:** provides information about specific buttons on the screen and describes their function.
- **Results:** describes the outcome of a search, report, download, or other information entered into the database.
- **User tips:** has advice or further information on how to use this screen.

To view these features, you may either click the links under the Purpose section or scroll down the page. To close the help box, press the X button in the top right corner of the box.

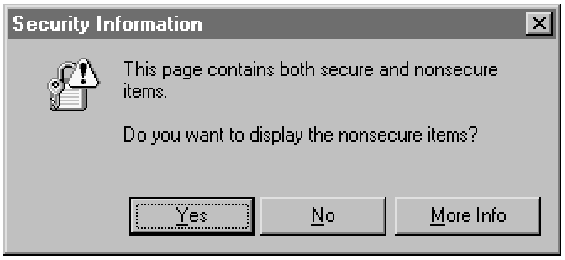
General Help

General help contains information on screens throughout IRIS. You may access this information by viewing the contents of general help, by viewing or searching the general help index, or by searching general help using a keyword.

Contents of General Help

To access the contents of general help follow these steps:

1. Click the light bulb on the menu bar.
2. Click **Help Contents** in the top left corner of the help box.
3. A box may open asking if you want to display both secure and non-secure items; click the **Yes** button.



4. The General Help screen now displays. On the left side of the page, view a list of topics, each with its own book-shaped icon.
5. Select a topic. A list of help items with question mark icons will display. You may also see further subtopics, each with its own book-shaped icon.
6. The help information you selected will display on the right side of the General Help screen.
7. Use the links at the top of the screen or scroll down to view the information you need.
8. To return to a previous help screen or to skip ahead one screen, use the browser's Back and Forward buttons.
9. To collapse a topic, select it or click on the book icon next to it. You may toggle back and forth between opening and closing a topic by clicking on the book icon.
10. To close out of the help box, click the X in the top right corner of the box.

Viewing/Searching the General Help Index

To view or search the general help index follow these steps:

1. Follow Steps 1-3 under *Contents of General Help*.
2. Click the **Index** button on the top left side of the General Help screen.
3. To find an index topic, use the scroll bar to view index topics.
4. Click one of the help items to view the item.
5. The help information you selected will display on the right side of the General Help screen.
6. To return to a previous help screen or to skip ahead one screen, use the browser's Back and Forward buttons.
7. To close out of the help box, click the X in the top right corner of the box.

IRIS Help Desk

If you are experiencing difficulties or have questions regarding IRIS, you may contact the IRIS Help Desk.

The IRIS Help Desk hours are 8:00 a.m. to 4:00 p.m. Monday through Friday.

- Help Desk telephone number: 800-374-3958

Appendix 2

In the Appendix:

Validation of Patient Entry Data

IRIS validates the information you enter on the patient screen when you attempt to save the entries. If you have entered data that IRIS considers invalid, a message will appear asking you to re-enter data in the field(s). Validation varies depending on the field. Refer to the chart below for information on validation of data in various fields.

Field Name	Web Page/Section	Characters Allowed
First Name	Enter New Patient/Personal Information, Manage Patient/ Personal Information	Allow only alpha characters, dashes, and apostrophes. Do not save an entry that matches a disallowed name.
Middle Name	Enter New Patient/Personal Information, Manage Patient/ Personal Information	Allow only alpha characters, dashes, apostrophes, and periods.
Last Name	Enter New Patient/Personal Information, Manage Patient/ Personal Information	Allow only alpha characters, dashes, apostrophes, and periods. Do not save an entry that matches a disallowed name.
Mother's First Name	Enter New Patient/Personal Information, Manage Patient/ Personal Information	Allow only alpha characters, dashes, and apostrophes.
Mother's Maiden Last Name	Enter New Patient/Personal Information, Manage Patient/ Personal Information	Allow only alpha characters, dashes, and apostrophes.
Responsible Party First Name	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only alpha characters, dashes, and apostrophes.
Responsible Party Middle Name	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only alpha characters, dashes, apostrophes, and periods.
Responsible Party Last Name	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only alpha characters, dashes, and apostrophes.
Street Address	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, periods, and apostrophes. Do not save quotes. Do not save an entry that matches a disallowed address.
Other Address	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, periods, and apostrophes. Do not save quotes. Do not save an entry that matches a disallowed address.
PO Box	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow alpha or numeric characters, backslashes, number symbols, dashes, and periods. Do not save an entry that matches a disallowed address. Do not save quotes.
E-mail Address	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Must contain "@" symbol and period. Do not save quotes.
Phone Number	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only numeric characters and dashes. Do not save quotes.
City	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only alpha characters, dashes, and apostrophes. Do not save quotes.
Zip	Enter New Patient/Responsible Person(s), Manage Patient/ Responsible Person(s)	Allow only numeric characters. Do not save quotes.

Disallowed Address Entries

Disallowed Address Entries	
DO NOT USE	NO CURRENT
UNKNOWN	MOVED
GENERAL DELIVERY	UPDATE
DECEASED	MAIL RETURNED
ADDRESS	COMMENT
FAMILY PLANNING	FAMILY PLANNING SERVICES
PLANN PARENTHOO	PLANNED PARENTHOOD

Disallowed First Name Entries

The following chart identifies first name entries that are not allowed in IRIS.

Disallowed First Names			
ADOPT	HBS	LSS	UNK
ADOPTIVE	HRH	LSS BABY	UNKN
AF BABY	I	LWG	UNKNOWN
BB	ILLEGIBLE SIGNATURE	MALE	UNKNOEN
BABY	INFANT	MR	UNKOWN
BABY B	INFANT BO	MRS	UNNAMED
BABY BOY	INFANT BOY	MS	UNREADABLE
BABY G	INFANT FE	NEWBORN	V
BABY GIRL	INFANT FEM	NFN	WLCFS
BABYB	INFANT G	NTXHW	XWM
BABYBOY	INFANT GI	PARENT	XXX
BABYGIRL	INFANT GIR	PARENTS	UFA

BG	INFANT GIRL	PENDING	
BOY	INFANT GRL	PVN	
BOY I	INFANT M	SIGNATURE	
BOY II	INFANT MA	SLKDFSLKD	
CHILD	INFANT MAL	SRM	
CSS	INFANTBOY	THWJ	
FEMALE	INFANTGIR	TOMORROW'S CHILDREN	
FIRE DEPT	INFANTGIRL	TSWJ	
GIRL	INFANTMAL	TSWM	
GIRL I	INFANTMALE	TSWV	
GIRL II	LCFS	TXWM	

Disallowed Last Name Entries

The following chart identifies last name entries that are not allowed in IRIS.

Disallowed Last Names			
ADOPT	CSS BABY	LSDKFSLDK	UNKNOWN
ADOPTIVE	CSSW	LSS	UNKNOWN
A BABY	D S S	LSSFC	UNNAMED
A F BABY	DCS	LTJR	UNREADABLE
AF	DFS	MBABY	V
AF BABY	DSS	M BABY BOY	VBABY
AF BABY BO	E BABY	MALE	VLK
AF BABY GI	F BABY	NEWBORN	WLCFS
AFBABY	FF	NLN	ZBABY
B C S	FIRE DEPT	OBABY	UFA
B S C	FWV	PBABY	
BABY	G BABY	PCS	
BABY BOY	GARCIA INF	PENDING	
BABYBOY	GIRL	RBABY	

BABY GIRL	GSST	SBA	
BABYGIRL	H BABY BOY	SBABY	
BCS	I	SCI	
BCSW	INFANT	SB	
BOY	INFANT BOY	SC	
BRT	INFANT FEM	SIGNATURE	
BSC	INFANT GIRL	SMRT	
CAC	INFANTBOY	SRB	
CS	INFANTGIRL	SRFC	
C S S	INFANTMALE	SRP	
CAC	LSS	SS	
CBS	LCFD	TAO	
CCS	LCFS	UN	
CFCFS	LCSF	UNK	
CS	LNAME	UNKN	
CSS	LS	UNKNOWN	

Glossary

ACIP
Advisory Committee on Immunization Practices. Along with the Centers for Disease Control and Prevention (CDC), provides written recommendations on the administration of vaccines to adults and children in the United States. These recommendations include a schedule of dosage, contraindication, and periodicity information for each vaccine. This "harmonized schedule" is the default tracking schedule within IRIS.

Bookmark
A browser tool used for accessing Web sites quickly. After setting a bookmark at a Web page, you may return to that page simply by clicking on its bookmark, rather than entering the entire Web address. Also known as a favorite.

Browser
A software program to access the Internet.

CoCASA
Comprehensive Clinic Assessment Software Application. A tool developed by the Centers for Disease Control and Prevention (CDC) used for assessing immunization levels of patients for an immunization provider.

CDC
Centers for Disease Control and Prevention. The CDC is the lead federal agency for protecting the health and safety of people, providing information to enhance health decisions.

Clinician
A person who provides a health care service. In IRIS, this term describes a person who administers an immunization; for example, a nurse.

Custom Flat File Template
A customized layout, specifying fields and field lengths, for performing data exchange.

Data exchange
A feature that allows health care providers to automatically exchange immunization batch files with IRIS.

Deduplication
An automatic process that displays potential patient matches to help ensure that patient records are not duplicated in IRIS.

Desktop
The default screen on your computer that displays when no programs are open. The desktop contains shortcut icons that allow the user to open various programs and files from the desktop screen.

Favorite
See Bookmark.

Grace period
The default period of time prior to and following an immunization. This time period is used to validate a patient's immunization history. It does not affect immunization recommendations.

Historical Doses
Doses that the patient received, but it is unclear which organization in the registry, if any, actually administered the dose. (See also IRIS Inventory Doses and Other Owned Doses.)

HL7
Health Level 7. A method of categorizing data so that it is uniform across all health reporting systems. Allows for easier data transfer among different systems.

Home page
The first screen in IRIS that displays. This page contains announcements, release notes, resources, and the menu.

Hyperlink
A word or group of words that is underlined and appears in a colored font, usually blue, in IRIS. When you click on the underlined text, the Web site, page, or document that is described will be displayed. Also known as a link.

Immunization Information System
Confidential, computerized information system containing patient demographics and immunization histories. Immunization Information Systems enable public and private health care providers to maintain consolidated immunization records for patients.

Inventory Doses
Doses that are recorded in IRIS through the user interface which subtract from an inventory lot whose quantity is recorded and maintained in IRIS. (See also Historical Doses and Other Owned Doses.)

Logout
Button on IRIS' menu bar that allows you to exit IRIS. You may logout from any screen in IRIS.

Lot number
The unique, identifying number given to each vaccine by the manufacturer.

Manage Access/Account Screen
The first screen in IRIS, which displays for users who have access to multiple organizations. The user chooses one of the organizations to access. Only one organization can be accessed at a time.

Menu bar
The IRIS menu bar is purple and appears at the top of every screen within the registry. The menu bar has several menu options: home, change password, logout, and help (light bulb). The menu bar on your Internet browser, is located near the top of your computer screen and contains words with drop-down lists such as File, Edit, View, Tools, etc.

Menu panel
The IRIS menu panel is purple and appears to the left of every screen within the registry. The menu panel lists all of the IRIS functions available to the user.

Ordering authority
A person with the capability of ordering an immunization for a patient; a person with ordering authority is generally the patient's health care provider or, within public health organizations, the medical director.

Other Owned Doses
Doses that the organization knows it has administered, but not from any vaccine lots maintained in the IRIS inventory module. (See also Historical Doses and Inventory Doses.)

Patient
Anyone who has an immunization recorded in IRIS.

Patient Note
Some general, non-medical information regarding the patient that is displayed to any user viewing the patient's record.

PDF
Portable document file. A file format that allows you to view and print a document online in its original format with Adobe Reader.

Portal
The Portal is the gateway into the Iowa Immunization registry Information System. The Portal allows users to navigate into the IRIS application or the IMC application based on their login credentials.

Radio button
An input circle that, when clicked, fills with a black dot to indicate a selection.

Recall Notice
A card or letter that informs a responsible person or patient of immunizations that are overdue.

Release
A new version of an application, which usually includes enhancements and software fixes. Each release of an application is indicated with a number; for example, IRIS release version 2.0.

Reminder Notice
A card or letter that informs a responsible person or patient of immunizations that are due in the future.

Responsible person
A parent, relative, or guardian who is associated with the patient and may act as a contact. A patient may also act as the responsible person for himself or herself.

Sequence
Identifies which dose is being referred to within a vaccine series. For example, a number "2" sequence indicates the second dose of the series.

Series
The combination of doses for one vaccine that provides immunity for a certain disease or diseases. For example, the recommended series for the DTP/aP vaccine contains five doses.

Shortcut
An icon located on your computer's desktop which, when double-clicked, will open the program displayed by the icon.

Subpotent
This field allows you to specify whether the selected immunization was a "subpotent" immunization. "Subpotent" meaning something went wrong when the immunization was being given and was not administered entirely.

Toolbar
Located near the top of your computer screen, the toolbar on your Internet browser contains several buttons, such as Back Forward, Stop, Refresh, and Home.

Tracking schedule
A schedule of recommended vaccines, their dosage and periodicity information. The tracking schedule is used to validate a patient's immunization history and makes recommendations for future vaccinations based on that history.

Undeliverable Address
An indicator that the address currently on file for the patient is incorrect.

User Interface
The IRIS application on the internet that the user accesses.

User roles
IRIS users are categorized into hierarchical roles that determine their level of access to the functions of IRIS.

Users
Individuals who access IRIS in some way, whether it be for printing reports, entering immunization information, tracking inventory, or entering organization-specific maintenance information.

Vaccine group
A category that describes one type of vaccination. For example, the vaccine trade names Engerix-B, Comvax, and Recombivax all fall under the Hepatitis B vaccine group.

Vaccine trade name
A unique, identifying name for a vaccine series given by the manufacturer. For example, Engerix-B is the trade name for a Hepatitis B vaccine manufactured by GlaxoSmithKline.

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